

# Evernote Essentials

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# Evernote Essentials

*by Brett Kelly*

# Introduction

I'd be willing to bet that at some point in your life you've purchased a paper notebook of some kind. Maybe it was wire-bound and cost a nickel at the grocery store; or perhaps it was encased in a rare animal skin and cost you more than the outfit you were wearing at the time. Your notebook may have been used for anything from compiling shopping lists to brainstorming the Definitive American Novel. It could be equally useful in tracking a list of tasks or keeping tabs on your monthly spending at the Waffle House. None of this actually matters as long as you can identify with the need to have a large number of pages bound into a conveniently portable little package.

Paper notebooks have their obvious limitations. As handy as they can be, they, to use an Internet buzzword, don't scale. If your notebook isn't with you when you need to find something written in it or record a new idea, you're out of luck, Chuck. And flipping through a hundred pages or so in search of that phone number you jotted down in the elevator at that conference is, to say the least, inefficient. Now imagine you could take that same paper notebook and add any type of digital file you wanted to it. It could hold images and record your voice and play it back to you. You could easily rearrange the pages, annotate them in any way and search the whole mess from the top of the very first page. That's Evernote: a ubiquitous digital notebook which syncs to the web and across all of your devices that can capture, store and index just about any type of data you can throw at it.

Since you're reading this, chances are you have at least a fleeting interest in learning more about this versatile application/service. As I write this, I've been using Evernote for almost two years and have approximately 3,700 discrete pieces of information stored in it. From funny pictures that I've found on the

Internet and digital backups of my tax forms, to electronic books and audio recordings I've both made and found — even this very text you're reading right now — it all lives in Evernote.

My goal in writing this is twofold; take people from Evernote Newbie to Evernote Ninja and take the Evernote Ninjas and show them a few tricks and advanced techniques they never knew existed.

A lofty goal, I admit. But, I'm one of the biggest Evernote nerds you're likely to come across and I think that, if you're really interested in getting the most out of Evernote, this is the book for you. So, rather than continue prattling on about it, we're going to get into the nuts and bolts of the application, the web service and the mobile platforms (*yes, Evernote is all of these things*). We'll cover how to configure Evernote for the first-timers as well as how experienced Evernoters can make the most out of things like tagging and advanced searching.

To make sure we're all speaking the same language, I've defined a few key terms that will appear very frequently within this book. I give you The 60-Second Evernote Glossary:

**Database:** While not an official term, you'll see it throughout this book as a succinct descriptor for your entire collection of Evernote notes and notebooks.

**Note:** A single item stored in your Evernote database. This could be a PDF, an image, a piece of text, an audio file or any combination thereof.

**Notebook:** A named container used for storing notes in a logical way (*you might have a notebook called "Shopping Lists" or "Recipes", for example*). You may have as many notebooks as you like.

**Tag:** A descriptive piece of text applied to a note that can be used to identify it later or group several notes by topic. Each note may have multiple tags (or none at all).

**Clipping:** The act of snagging content from a source (*your web browser or another application on your desktop or mobile device*) and adding it to your Evernote database.

**Sync (or synchronization):** Evernote's behavior of keeping an up-to-date copy of your entire database (*except the parts you tell it not to*) somewhere on the Internet. This happens at timed intervals that you can configure.

**Premium Subscriber:** An Evernote user that pays a nominal fee every month for additional features and the ability to add more data per month than free users.

**Shortcuts (keyboard):** A set of “global” keystrokes (*which means they work no matter which application is currently active*) for adding new notes, taking screenshots or initiating a new search of your Evernote database.

**Saved Search:** When you search Evernote, you have the option to assign a name to those specific search terms and run the same search later on with a single click.

**Attributes:** Bits of data about each of your notes — the day it was created, how it was added, what types of media it contains, and so on. Each note in your database has these (*though, some have more than others*).

**URL:** An Internet acronym which stands for Uniform Resource Locator. It's just a fancy name for a website address, like <http://brettkelly.org> (*it can actually refer to many other things on the web, but in this book, we'll use it only to refer to website addresses*).

Throughout this book, I'll be referring you to «the resources page». This is a page on my Web site where you can find all of the links and such referenced in the text (*lest they change and this thing goes out with one or more bad links in it*). The resources page is located at <http://nerdgap.com/evernote/resources>.

Ready to dive in? Let's do this.

# Evernote Anatomy

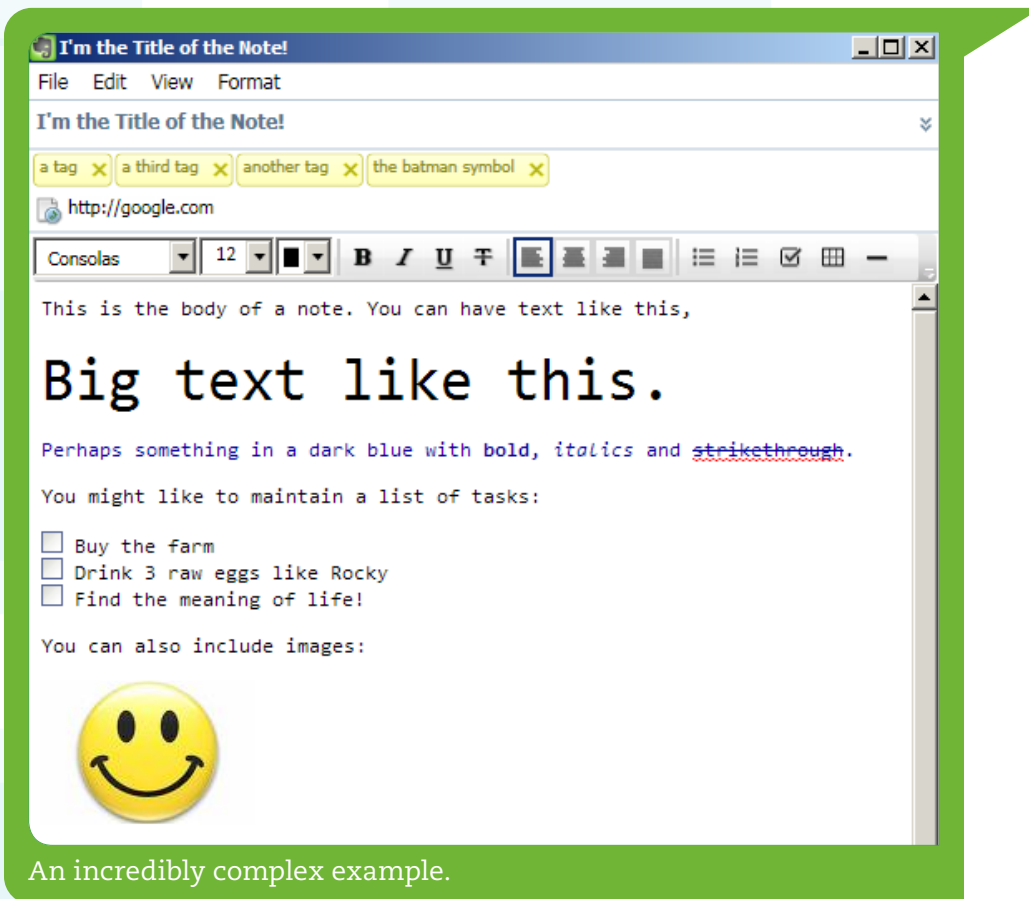
Everything you store in Evernote is kept in a note. While this may conjure up images of phone numbers or book titles scrawled on sticky notes or maybe the backs of envelopes, notes in Evernote are much more powerful. Let's take a look at the anatomy of an Evernote note. Peek at the left side of this page for an incredibly complex example.

Quite a bit going on there, right?

At the top, we have the usual Windows menu (*File, Edit, View, etc.*). Click around these menus to see the various options; I think you'll find them pretty self-explanatory.

Below the menu is the title of the note. The title can be whatever you'd like, just click on the title itself to change it. Next are the tags (*in the little yellow rectangles*). You can add more tags by clicking to the right of the last tag and remove them by clicking the little 'X' inside each tag. If you start typing a tag that Evernote already knows about, it will offer you the option to automatically fill in the rest of the tag. Just below the tags, you'll find the source URL field. If you use one of the Web Clippers (*we'll talk about those later*) to grab the contents of your note, the source URL field will contain the URL of the webpage from which you clipped it. If you'd like to change the value of this field, you can edit it directly by clicking on it.

Now we're to the fun part: the body of the note. As you can see from the screenshot above, that white rectangle is pretty versatile. Directly above it, you'll find all of the various formatting options available to you when editing



An incredibly complex example.

your note. Choose a font, size and color as well as alignment and justification options, bulleted and numbered lists, checkboxes (*for to-do's*), simple tables and a horizontal divider. If you've used any type of word processor or WYSIWYG (*"what you see is what you get"*) editor on the web, chances are you've seen most of these options before. If not, play around with them and you'll have the hang of it in a couple of minutes.

In the body of your note, you have several examples of styled text. You have big text, small text, black text and blue text (*Dr. Seuss fans – I'm available for parties*). Like I said, the text-styling stuff is pretty standard if you've used other rich text editing tools in the past. Let's look at the things you're not used to seeing.

Checkboxes are pretty darn useful if you like to make lists (*and goodness knows I do*). While you can add them by clicking on the checkbox image above the body, it's much easier and faster to do it using the keyboard shortcut (*Ctrl+Shift+C on Windows, Cmd+Shift+T on OS X*). Once they're in there, you can select and deselect them all day long.

If you want to add images, you have a few options. You can copy images from the Web if your OS supports it (*right click > Copy, then Paste into Evernote*) or you can drag them from your desktop or web browser. You can also email images to Evernote (*which we'll cover in greater detail later on*).

If you're a Premium Subscriber and want to add files to your notes, you can do that by dragging them from another application on your desktop or by emailing them. There's no limit as to the type of file that can be added, so go ahead and drop whatever file you like onto a note and Evernote will keep it safe and accessible.



A couple of additional factoids about notes:

- ✓ A single note cannot be larger than 25 megabytes. For most people, this isn't a big deal, but if you're thinking of using Evernote to store your raw video footage or DVD rips, you're mostly out of luck (*unless the file is 25mb or smaller, obviously*). If you're a Premium Subscriber, that limit goes up to 50mb per note.
- ✓ If you right click a file in Evernote and open it with an external application, any changes you make will affect the file stored in Evernote when you save it. For example, if I have a spreadsheet housed in a note and I open it with Excel, modify a few things and save it, then the version in Evernote will reflect the changes made. This is called the «Live Update» feature and is really handy if you find yourself editing a file stored in a single note from multiple computers.

Now then, let's spend some quality time installing and configuring Evernote on your PC or Mac.

# Installation and Configuration

The first thing to do is get Evernote installed everywhere you can. The Evernote folks realize that the power of information is in its availability and ubiquity, so they build client applications for the two main players in the desktop operating system market — Mac OS X and Windows — as well as just about every major smart phone operating system in use today (*Apple's iPhone, most modern Blackberry devices, Android smart phones, Windows Mobile and the Pre and Pixie devices from Palm*). Since you're not just looking for another digital junk drawer that lives on only one computer, you should consider installing Evernote on all of your machines and devices because, after all, you want to be able to access your stuff from anywhere, anytime.

For details on installing the client application for your specific platform(s), visit this book's resources page for a link to the Evernote download page.

Once you've installed Evernote on all of your favorite hardware, you need to do a couple of other things to make your interactions with Evernote as friction-free as possible. First, you'll want to install the Web Clipper, Evernote's super slick tool that allows you to easily clip content from the web directly into your Evernote database.

If you head over to the Evernote Web Clipper installation page (*see the resources page for a link*), you'll see several options. If you're using Internet Explorer as your primary browser, then you don't need to do anything — the Clipper was installed along with the Evernote desktop application. Using Safari on the Mac? Same deal — it's already installed (*but you'll need to restart Safari after installing*

Evernote to see the plugin). If Mozilla Firefox or Google Chrome is your poison, there are links to extensions you can add to either of these browsers that will let you clip web content directly into your local Evernote database. For all other browsers (like Opera, Webkit, Camino and others), you can use the handy dandy bookmarklet. The only difference here is that, instead of clipping content into your local installation of Evernote, it is clipped to the web version and any new content will arrive in your local installations the next time the application syncs.

There's one more little bit of information to take note of before we go any further: your private Evernote email address. This magical email address is where you can send any content you want added to your Evernote database from any email address. If you login at the Evernote Web site and click Settings at the top, you'll find this address under "Account Summary" and it will look like this: `username.a2e4r5@m.evernote.com`. Copy that little jewel into your favorite address book application. You're going to need it!

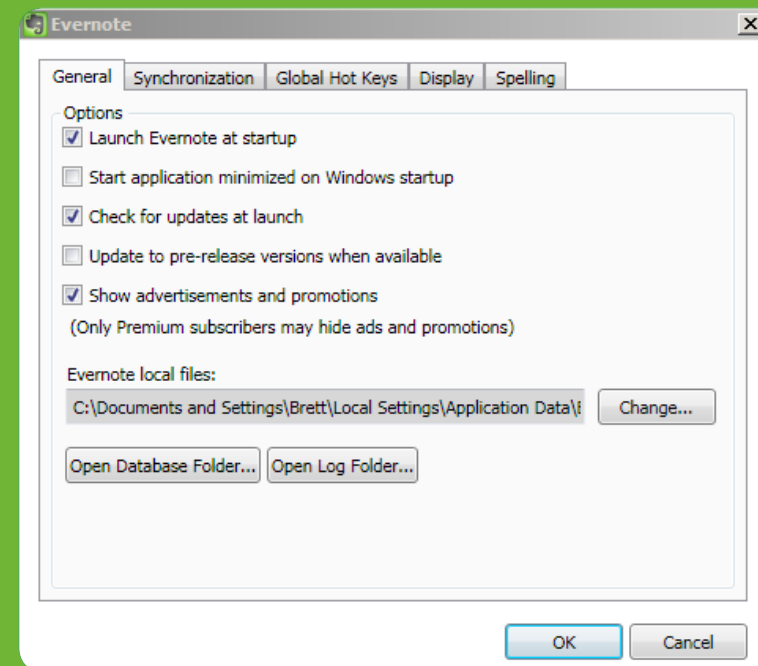
## Initial Configuration

I know you're just itching to start lobbing hunks of data into your spiffy new Evernote database, but let's go over some of the configuration options available to you within the Windows and Mac OS X client applications. While I will be covering the two platforms individually to avoid confusion, you should know that the majority of the configuration options are available on both platforms. Also, we're not going to cover every single configuration option, as many of them are self-explanatory (i.e. *which font you'd like to use*).

## Configuring Evernote for Windows

If you click Tools > Options at the top of your main Evernote window, you'll see a dialog box that looks a whole lot like the one over there to the left:

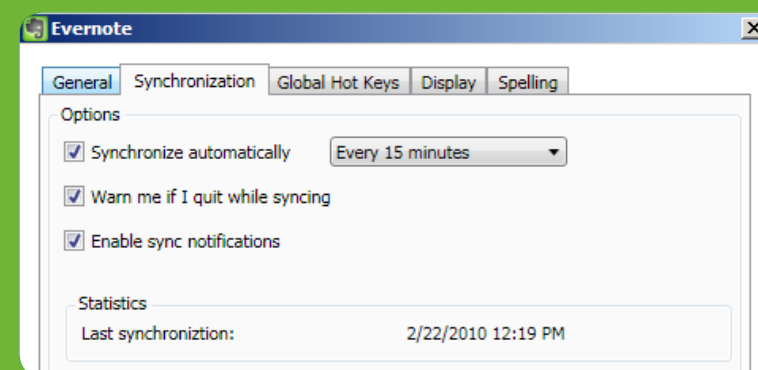
The General tab of the Options dialog box.



We have a few options here, most of which are pretty straightforward. The only checkbox that's a little ambiguous is the "Update to pre-release versions when available" option. Selecting this option means that, when Evernote releases a beta version of their product, you'd like to install it and use it as a way of helping them test it. If you decide to go this route, you're implicitly stating that you are ok with the application possibly having some issues and that there's a remote possibility that the software may become inoperable. It doesn't mean that, in case of a catastrophe, your data is necessarily lost (*though, that is also a possibility*). If you'd rather wait for the stable releases, leave this option deselected.

The bottom of this tab shows the location of your Evernote database on the local filesystem. If you want to change this location, you can do so by clicking "Change...". You can also view the internal log files generated by the application when it's running by clicking "Open Log Folder...". These can be helpful if Evernote is behaving strangely and you'd like to know exactly what's causing the trouble, or if an Evernote representative is trying to figure out the same thing.

Now, let's click the "Synchronization" tab. If the computer monkeys are in a good mood, it will bear a striking resemblance to the box on the left:



Synchronization options.

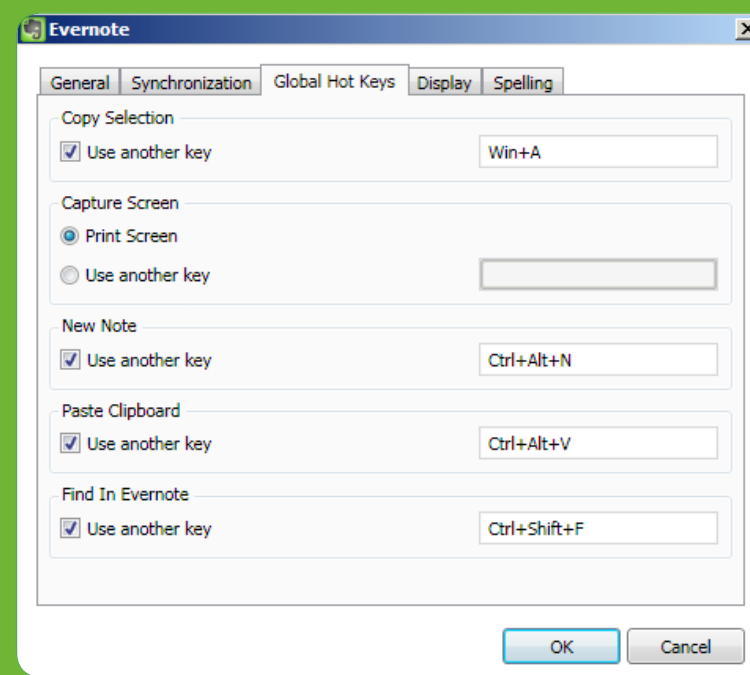
Here, you can tell Evernote how often you'd like it to automatically synchronize changes to your data (*or if you'd like to do it manually*). I like to sync as often as I can to make sure my stuff is current, and because, most of the time, syncing takes a few seconds. The second checkbox means just what it says: if you try to quit the Evernote application while a sync operation is happening, this

box determines whether or not Evernote will inform you of this. Leaving this deselected means that the sync will quietly cancel and the application will exit.

Sync notifications are little semi-transparent windows that appear on your screen when something interesting happens regarding a sync. If one completes, it tells you how many files were synced and if there were any images processed. If a sync fails for some reason, it will tell you that, too. If you don't mind having a little window pop up for a few seconds every few minutes, I'd say leave this option enabled because it's really nice to know on the rare occasion that a sync fails.

If you select the "Global Hot Keys" tab, you'll see something like this (look left):

Configure your Global Hot Keys for your soul's health.



These are the keys that let you manipulate Evernote from anywhere on your system, no matter which application you're actively using. All of these are configurable, so if you want to change the keystroke that performs a given action, just click in the box where the current keystroke is described and strike whatever keystroke you'd like to perform that action going forward. Let's look at each one individually:

If you want to copy some text from the Word document you're editing into Evernote, you can highlight it and strike Win+A (*"Win" refers to the Windows key which lives between the left-hand Alt and Ctrl keys on most modern keyboards*). That will take the highlighted text and shove it into a new note in Evernote.

Evernote comes stock with the ability to capture images of your screen. If you hit the Print Screen button (*look to the right of your Backspace key*), you'll see a crosshair appear. You can either click a window to grab the whole window or draw a rectangle to capture just that portion of the screen. Once you've made your selection, it will be added to a new note in Evernote.

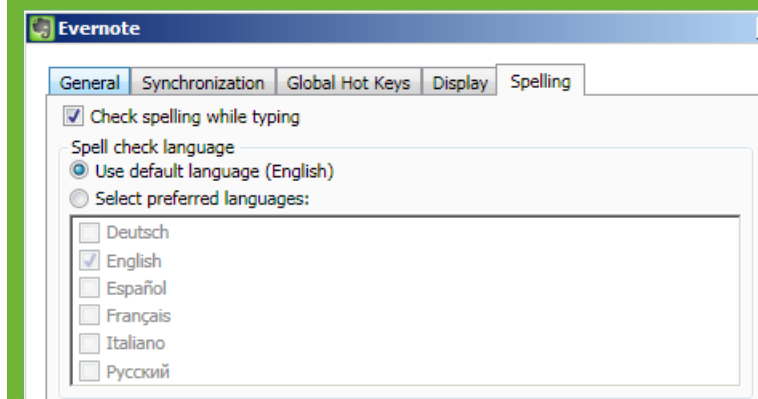
If you want to jump from anywhere into a new, blank note in Evernote, you can do so by striking Ctrl+Alt+N. If you'd like to paste the last thing you copied (*again, from any application*) into a new note, strike Ctrl+Alt+V. To jump directly to the Evernote search field from any application, strike Ctrl+Shift+F.

The Global Hot Keys (or “Shortcut” keys) are one of the most useful features of Evernote on the desktop and one of the first practices I recommend everybody learn when they're first starting out. Making these keystrokes a reflexive part of your workflow is an excellent first step on the road to Evernote ninjedom.

The display tab (*pictured over there on the left*) lets you choose the fonts and sizes of text displayed in the Source list, note list and the body of the note itself. Modify these to your liking and comfort.

Finally, the spelling tab: this allows you to control which languages your Evernote installation will understand and for which it check spelling. I only speak English, so mine sits comfortably with the default setting. If you're one of those amazing people who can speak more than one language, feel free to play around with these settings.

Pick a font. Any font.



I don't know how you bilingual people do it.

Thus ends our short tour of the Evernote configuration screens for Windows. Now, let's take a gander at their OS X counterparts.

## Configuring Evernote for OS X

Let's get started dialing Evernote in on your Mac. Select Evernote as the active application, then click Evernote > Preferences. You'll be greeted with a window that looks something like that thing over there on the left.

Across the top, you'll see several tabs showing the various groups of options you can fiddle with. Because we're logical folk, let's start where the app has suggested we start: General. The interesting settings on this screen deal with deletion confirmations (*translation: decide whether you want it to ask before deleting a tag or saved search, both of which will be discussed in painful detail later*) and using Growl, a third-party notification application for OS X. If you have Growl installed (*and you should*), feel free to poke around in that application's preferences to configure how notifications are displayed.

If you're a Premium Subscriber, here you can disable the small advertisements that live in the bottom left corner of the main application window. «Show Elephant in Menubar» gives you easy access to the same functionality provided by the global shortcuts (*more on that in a sec*).

Click «Sync» at the top of the window you'll see a window like the one on the left:

This option controls how often the application attempts to synchronize its data with the Evernote servers in some refrigerated warehouse someplace. I set mine to every 5 minutes and it generally only takes a few seconds to finish. Feel free to set it at a larger interval or turn off automatic syncing by selecting «Manually». «Warn me if I quit while syncing» does exactly what it says — if you try to quit the application while a sync operation is in progress, it will politely warn you that this is the case and ask you if you want to exit or cancel

The General tab of the Evernote Options screen on OS X.



These are the options for Sync. Also, water is wet.



and wait for the sync to finish. If this option is disabled, the sync will cancel quietly and the application will close as instructed.

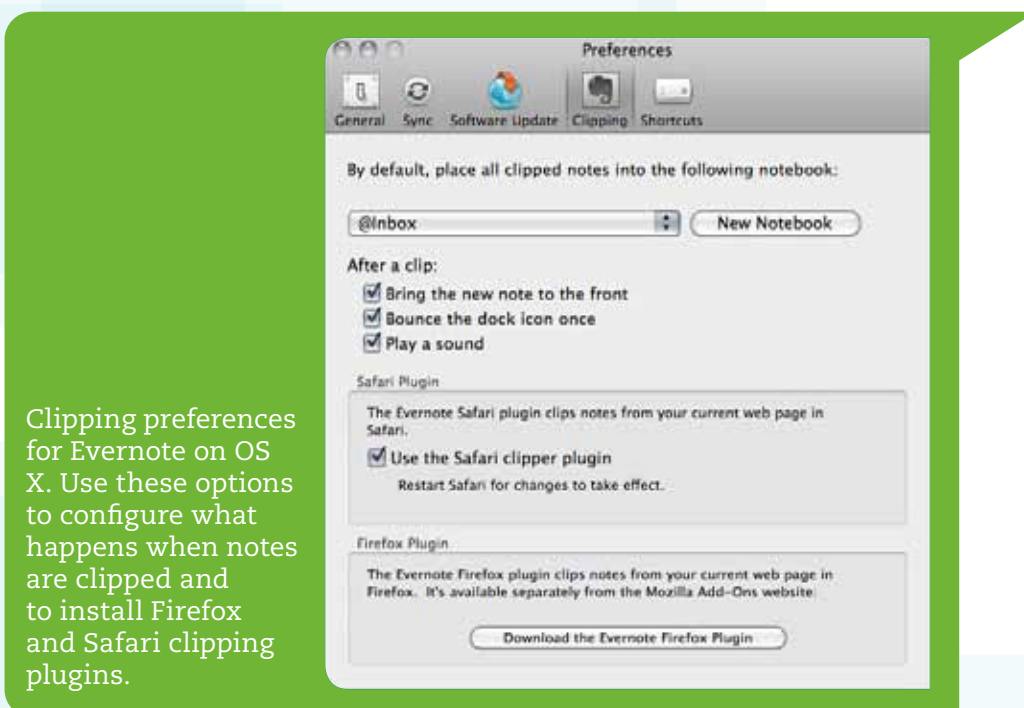
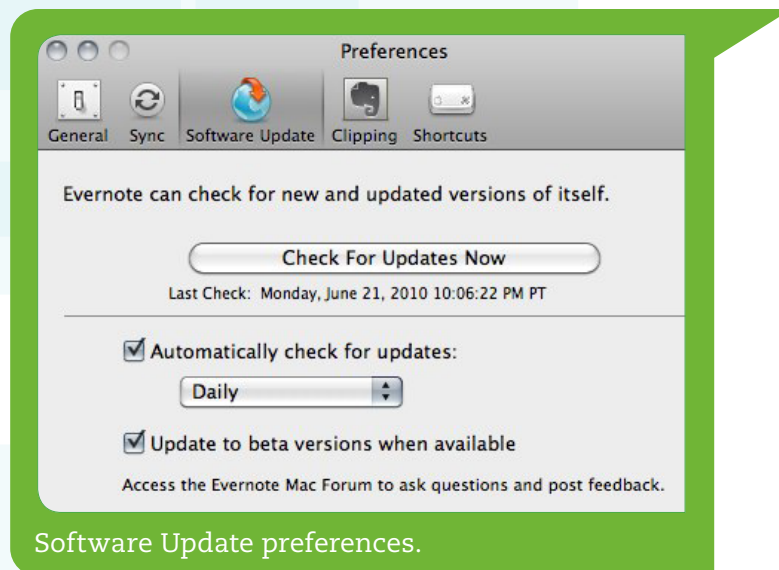
Moving on to “Software Update”:

Both desktop versions of Evernote have the ability to check for application updates. In my experience, getting the newest version of this app is generally a good idea, so I have it set to check for new updates daily. It will also check whenever you launch the application. You always have control, though; it won’t download and install anything without an OK from you.

If you’re feeling particularly daring, check the “Update to beta versions when available” box. Just like in the Windows version, checking this means that if the Evernote folks have an update they feel is just about ready for prime time, but would like to give it some real-world testing, you’re up for being part of the test. This doesn’t mean that installing beta software will result in your being unable to use it or your data being eaten by wild dogs — but it could. When in doubt, leave this unchecked.

Select the “Clipping” tab and your Mac will spit out a window like the one on the left.

“Clipping” is Evernote speak for “adding stuff from another source to my Evernote database.” These preferences control how the application behaves when you clip something new, not how you go about clipping (*which will be explained more in the next chapter*). The first option is the notebook where you’d like freshly-clipped items to end up. I’m a big fan of having an “Inbox” notebook that keeps all of my newest clippings for review and filing later on, but you can choose any notebook you like. The three checkboxes below are pretty clear. If you’re anything like me, soon you’ll be clipping content while you’re working on other things and you may not want to be interrupted by a new window appearing. If this is the case, leave “Bring the new note to the front” disabled.

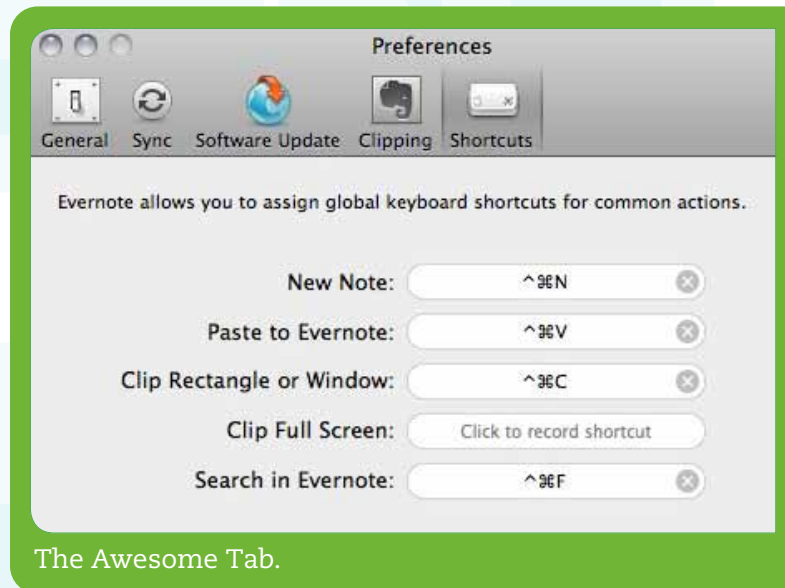




The rest of this panel deals with installing and using the browser extensions for Safari and Firefox. Again, we're going to cover clipping extensively in a bit, but I suggest installing one or both of these extensions depending on which browser you use. I use both, so they're both installed on my machine.

Let's click over to the last tab, "Shortcuts" (or, as I call it, "The Awesome Tab"). In case you haven't noticed the pattern, the image is on the left.

These options control the global shortcut keys, meaning they're available anytime, not just when you're in Evernote:



- ✓ **“New Note”** lets you create a new Evernote note in the active notebook. Strike this keystroke and you're instantly looking at a blank Evernote note.
- ✓ **“Paste to Evernote”** lets you paste whatever you most recently copied to the system clipboard (using `Cmd+C` or `Edit > Copy`) into Evernote.
- ✓ **“Clip Rectangle or Window”** opens a window on top of whatever you're looking at and allows you to draw a box to save that portion of the screen as an image to Evernote, or simply click any window to save that whole window.
- ✓ **«Clip Full Screen»** clips, you guessed it, the entire screen into a new note.
- ✓ **“Search in Evernote”** will switch to the Evernote application and put your cursor in the Search input at the top right. It also selects “All Notebooks”, which is a big help. (You'll see why a little later in the section on Search.)

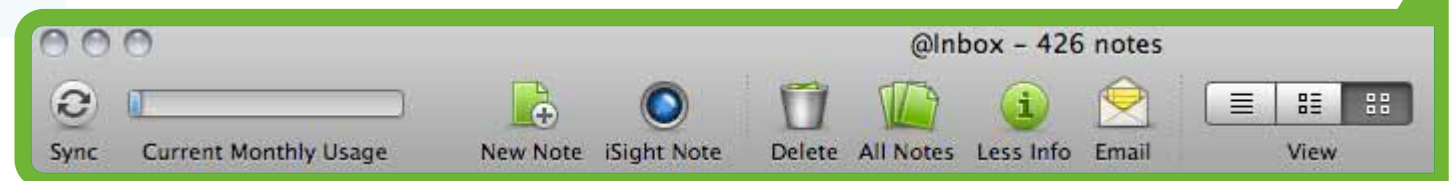
The default options for these keystrokes are probably fine for most people. They can be a little cumbersome to strike because of the hand contortions required, but after a bit of use they'll become second nature. If you want to change any of these keystrokes, click into the appropriate input field and strike the keystroke you'd like to use.

Thus ends our quick saunter through the Evernote preferences. Let's poke around the rest of the Evernote interface a bit and see what's going on.

# A Quick Tour of the Main Evernote Window

The layout of the Evernote interface should be somewhat familiar, particularly to those using OS X. Let's check out the major components:

The toolbar at the top contains several commonly-used options for creating and managing your notes: adding new notes, emailing notes, the status of your account, etc. You can click on the “Current Monthly Usage” graph to show a detailed view of how much of your monthly data allotment you've used. With the exception of the search box (*which holds the keys to the universe – more on that later*), the rest of the options are self-explanatory:



The rest of the interface is divided into two logical areas. On the left, you have a myriad of ways to filter your notes. The right hand side shows the results of any filtering you've done.

If you select “All Notebooks” on the left, the right-hand pane will display every single note you have. From there, you can use the four main filtering options to narrow your search: Notebooks, Tags, Attributes and Saved Searches. If you're just starting out, chances are you only have a couple of notebooks and maybe a handful of notes. Clicking on a specific notebook will reduce the notes

displayed on the right to only the notes in that notebook. The other filtering options will essentially do the same thing.

After you select a notebook, you can select one or more tags to filter the notes further, etc. “Saved Searches” behave slightly differently in that once you select a “Saved Search”, you can’t filter your notes any further. The Attributes section allows you to filter your notes by several predefined options like the date the note was created or modified, whether it contains certain types of media (*like images, audio and others*) or how the note was added (*via email, browser clipper, etc.*). For example, if sometime in the last day you added a note containing a picture to Evernote using your iPhone, this would be a great way to quickly find that note. Here’s how the options might look in this case:

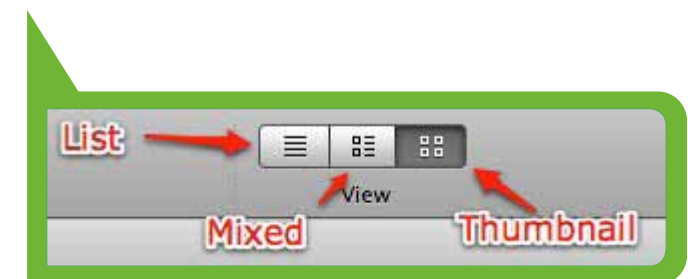


The bottom of the left-hand pane displays the current system activity if the application is performing a sync with the mother ship, as well as advertisements (*which can be disabled if you’re a Premium Subscriber*). The activity panel can be shown or hidden by clicking the requisite icon along the bottom border of the panel.

Let’s look at the actual notes, since that’s why we’re here, after all!

You can configure the right-hand pane to display a group of notes in one of three ways using the “View” selector in the toolbar at the top. I spend most of my time in List view, but switching to Thumbnail or Mixed can be a real time-saver when you’re looking for something visually identifiable like an image or PDF. Here’s a annotated view of the View selector:

The Evernote interface, while incredibly powerful, is also incredibly intuitive. Clicking on a note in the List or Mixed view will display the contents of that note and double-clicking a note in any



of the three views will open that note in a new window. All three views can be sorted using one of several options. In the List view, clicking on any column header will sort the note list using that column and clicking it again will toggle the order (*e.g.*, clicking “Created” will sort them by date with the newest note at the top; clicking it again will reverse the order and put the oldest note at the top). To sort the note list in Mixed or Thumbnail view, simply click the heading above the list of thumbnail images and choose one of the sort options.

When looking at an individual note, there’s a good deal of information you can see and adjust. The title, tags, source URL (*if appropriate*) and note content are the immediately obvious options, but there’s more! You can expand the note’s heading (*click the note title bar under Windows or the “More Info” toolbar option on OS X*) and edit several other note attributes like the geographic coordinates of the note, author and the created/updated dates. Admittedly, we mere mortals might not have occasion to adjust these values very often, but it’s nice to know they’re there.

Whew! This concludes our brief tour of the Evernote user interface. It’s time to add some stuff.

# Adding Stuff to Evernote

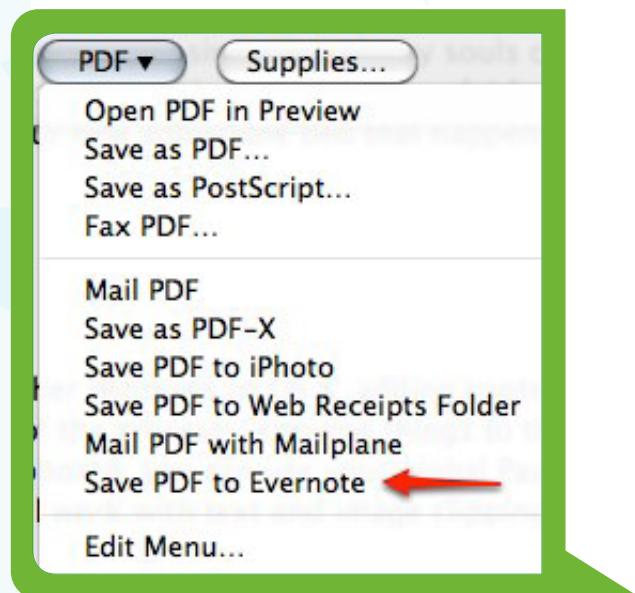
A big part of what makes Evernote such a powerful and useful application is the ease with which you can add things to it. We got a peek at some of these capabilities in the last chapter when we looked at the global shortcut keys, but it goes way beyond that, my friends. Let's look at each of the ways you can add stuff in greater detail — and who knows, maybe we can find some little hacky tricks along the way! But first, let's talk for a minute about what kinds of things you can store in Evernote.

Obviously the primary type of content you'd toss into Evernote would be some form of text — content from web pages, emails and other documents you want to lock away forever. You can also give it images, PDF files, even whole web pages. If you're a Premium Subscriber, the deal gets even sweeter since these lucky souls can add any file to Evernote and it'll be synchronized across all of your machines and devices. This is especially useful for things like the Time Off Request Form from HR and the electronic user manual for your new adjustable bed that happens to be formatted for Microsoft Word.

But how, pray tell, are we to quickly and easily get our entire digital lives into Evernote? Read on.

## Desktop Clipping

If you're using Evernote on your desktop in either Windows or OS X, adding content to Evernote is a piece of cake. In fact, you're already very familiar with the first half of the process – copying things to the system clipboard using Ctrl+C or Cmd+C. Once you've got something in the clipboard, you can use your global Paste to Evernote keystroke to shove it into a fresh new note in the active notebook. This will work with text and image clippings for all users and any file type for Premium Subscribers.



**Note:** Though you indicated a default notebook in the application preferences, when using the Paste to Evernote keystroke, it will create a new note in the active notebook, not the default notebook. Keep this in mind if, after doing your global paste ninja dance, you're unable to locate your note which happens to be in the "Cumin Waffle Recipes" notebook instead of "Inbox".

Aside from using the system clipper, you can also drag content from just about any application onto the notebook where you'd like the note created. The latest version of the Evernote application for Windows also adds an "Evernote" option to the "Send To" context submenu in Windows Explorer.

If you're using OS X, you have another option for adding content to Evernote that's available in just about every application that allows printing. If you click File > Print in your favorite app, you should see a "PDF" menu on the bottom left corner. Drop that guy down and choose "Save PDF to Evernote" and, presto, it's clipped:

The reason this option is only available on the Mac is that OS X has low-level operating system support for creating and rendering PDF files whereas Windows does not. If you have Adobe Acrobat installed on your Windows machine, you can choose "Adobe PDF" as the printer when printing a document

and save the resulting PDF to Evernote. While this solution does produce the desired result, it is a rather cumbersome workaround.

Before we move on to browser-based clipping, we need to discuss one of the sleeper features of Evernote: the ability to encrypt text within your notes. Using either desktop client, you can highlight a portion of text, right-click and choose “Encrypt selected text”. You’ll be asked for a passphrase that you can later use to decrypt this text. Please realize that if you encrypt a piece of text and forget the passphrase, it’s as good as deleted. Neither the Evernote system nor staff have any way of recovering your encrypted data, so be very careful to either use a passphrase you’ll remember or consider using the same passphrase for all of your encrypted text. Encryption is great for things like passwords, account numbers and other sensitive information, but be sure to remember that you can only decrypt plain text within notes; the application currently doesn’t support encrypting things like files (*including images and PDFs*), nor does it allow the encryption at the note level. The reason I bring this up now is that you’re about a million times more likely to encrypt the text you just clipped than to go back and encrypt it later.



## Clipping from the Browser

Since most of us spend a great deal of time in our web browsers these days, the Evernote engineering team rightly spent a great deal of time working on adding content to Evernote from the browser in a seamless and frictionless manner. Evernote offers plugins or extensions for several browsers in addition to Web Clipper bookmarklet that you can use in any browser. Let's take a closer look at each of these:

### Firefox and Internet Explorer

The two most widely used browsers today each have their own Evernote plugin and they actually do exactly the same thing: if you highlight some content in a web page using either of these browsers and click the little elephant icon, that content is added to your local Evernote database in your default notebook (*not the active notebook*). These extensions don't offer any additional capabilities or options, but frankly, I don't really think any are needed.

### Google Chrome

The Evernote extension for Google Chrome currently behaves exactly like the bookmarklet. When you click the elephant, the selected portion of the web page (*or the entire page if nothing is selected*) is clipped to the web version of Evernote. You'll see this inline dialog in your browser when you click the elephant:

Just fill in the options (*you can leave most of them blank*) and hit Save. Your newly clipped content will be available in your desktop Evernote client the next time you sync.

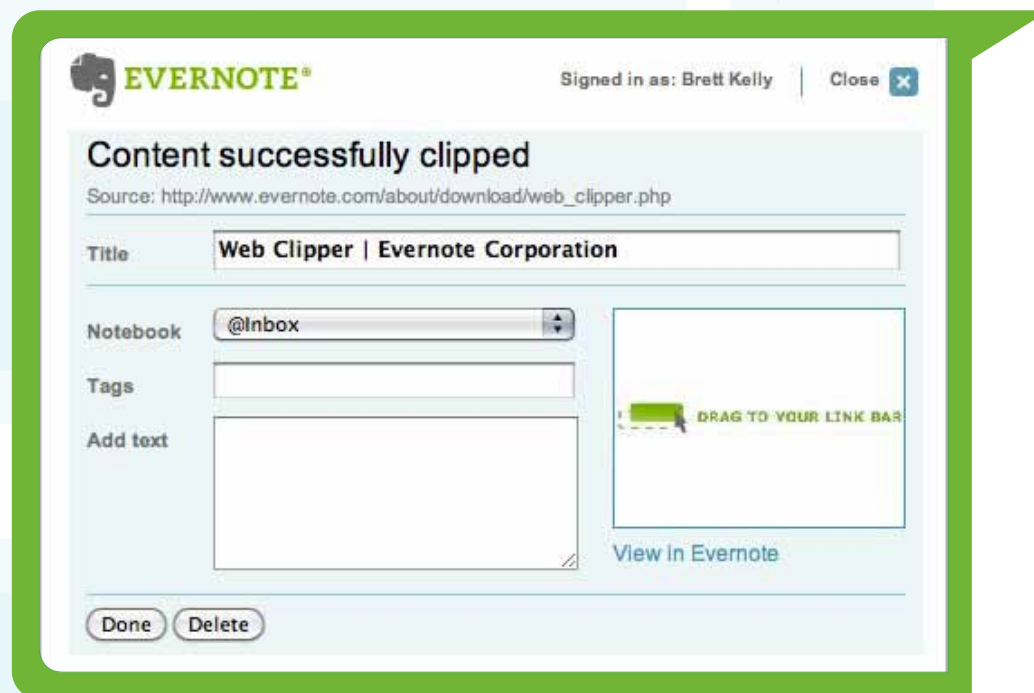
The image shows a screenshot of the Evernote Quicknote dialog box. At the top left is the Evernote logo and the text 'EVERNOTE®'. At the top right is a 'Sign out (inkedmn)' link. Below this is the title 'Quicknote' followed by the instruction '(to clip the content of this page, check the Clip full page checkbox)'. The dialog contains several input fields: a 'Title' field with the text 'Google|', a 'Tags' field, and a 'Notebook' dropdown menu currently set to '@Inbox'. Below these is a large 'Add text' area. At the bottom of the dialog, there are two checkboxes: 'Save page URL' (checked) and 'Clip full page' (unchecked). At the very bottom are 'Save' and 'Cancel' buttons.

## Safari

As we saw in the last chapter, Safari on OS X also has an Evernote plugin available. It works the same way as the plugins for Firefox and Internet Explorer, but with one really awesome trick which, in my experience, surprisingly few people are aware of. Clicking the elephant clips the current selection or web page to your local Evernote database, but if you hold the Shift key when clicking, it saves the current web page as a fully-rendered PDF. Because Evernote Premium supports searching and indexing PDF files, I use this like *crazy*.

## All the Rest

If your favorite browser hasn't been mentioned yet, don't despair. Just about any modern web browser is capable of utilizing the Web Clipper bookmarklet. Head over to the Evernote downloads page for the bookmarklet and drag it to your browser's bookmark bar. Once it's installed, you can click it and you'll be presented with this:



Again, you can accept the defaults for all of these values and just hit «Done». Clipped!

So, there's an overview of the different clipping capabilities for modern web browsers. I'd recommend installing any extensions available for your chosen browsers as they really do make adding web content to Evernote a snap. And, don't forget, you can clip text as well as images using any of these clipping tools! Let's look at another blade on the Swiss Army knife of adding content to Evernote: email.

## Emailing to Evernote

When you create an Evernote account, you're assigned a special email address that you can use to send content to Evernote from any email client. It's as simple as it sounds: send an email to Evernote and it gets added to your default notebook with the subject of the email as the note title and the body as, well, the body of the note. We're going to get very ninja with Evernote and email in Chapter 8, but this is the simplest way.

## Mobile

Evernote now offers native applications for several modern smart phones like the Apple iPhone, Windows Mobile handhelds, most Android and Blackberry devices and the Pre and Pixie from Palm. As of this writing, they're all able to create new text, voice and snapshot notes. These applications are built separately from one another and some of them do more than others, but you can get information on each one on the Evernote downloads page (*see the resources page*).

While Evernote has many native applications for modern smart phones capable of easy perusal and adding of notes, any smart phone that is capable of sending an email is also capable of adding content to Evernote. It's how I add a great deal of content from my iPhone because it's so simple!

Because the mobile space is such an important part of the Evernote experience, we'll cover it in detail in Chapter 7.

## Auto-Import Folders

Because Evernote is so friendly to things like images and PDF files (*which obviously originate somewhere outside of the Evernote application*), this one is a big help. An auto-import folder is a directory somewhere on your drive that Evernote watches for new files and, if it finds them, imports them one at a time into your default notebook. This can be a big time saver if you're constantly downloading documents from the web into some folder somewhere, then dragging them individually into Evernote.

## Third Party Hardware

Evernote is also a fantastic solution to your “too much paper” problem. If your filing cabinet is busting at the seams with old financial documents, lottery tickets and restraining orders, then you'd be a perfect candidate for a device called the Fujitsu ScanSnap. This little miracle is a hardware document scanner that sits on your desk and can send scanned documents directly to Evernote as PDFs or images. If you're trying to move toward a more paperless existence, the ScanSnap can give you a robust and simple way to get all of those papers into Evernote before you use them for kindling at your next bonfire.

Eye-Fi is a little company that took your standard SD memory card (*the kind you'll find in many modern digital cameras*) and somehow shoehorned a WiFi radio onto it so it can upload your digital photos wirelessly, directly from your camera. These folks have also partnered with Evernote to allow you to easily add your photos to your database without having to hook the camera up to your computer, import the photos and manually add them. If you store a lot of photos in Evernote, this one is worth looking into.

Evernote is adding new partners all the time that make excellent hardware and software that work with Evernote. For a complete listing of all of these offerings, visit the [Evernote Web site](#).

Clearly, Evernote gives you a myriad of options for adding content to your database. As I mentioned, we're going to cover the mobile and email platforms in greater detail later, but this should give you more than enough info to start adding things to your database! Next up, let's act like responsible adults and figure out how we're going to organize our Evernote lives before we inundate it with everything we have!

# Evernote Organization 101

When a person first installs Evernote, it's terribly common for him or her to start firing data missiles at it willy nilly without giving much thought to how, if at all, they're going to organize it. While the idea that you can simply add everything you want and search for it later has merit, it's your host's opinion that a proper balance between filing (*organizing data as it's added*) and piling (*adding everything and relying on search to find it later*) should be maintained. It's with this principle in mind that I give you what I consider to be an effective method of storing your notes for easy retrieval later on.

## Regarding Notebooks

Before we get into some of the best practices for the creation and use of notebooks in Evernote, it's important to point out that there are two types of notebooks available within Evernote: local and synchronized. Local notebooks are just like synchronized notebooks, except they only live on the computer on which they're created. So, for example, if you have a separate notebook containing the launch codes you need for your job managing the missile silo, chances are you don't want to have access to those anywhere but in your bunker office. Synchronized notebooks are, as the name implies, synchronized between all of your devices and the web and are the ones that you'll use most often. You also have the ability to share notebooks via the web if you so choose. You can see and control this setting from within the Notebook Settings panel: right-click a notebook, "Notebook Settings", then choose "Sharing and

collaboration options”. This will take you to Evernote on the web where you can configure all of the sharing bits and pieces for each notebook.

There is a bare minimum of two notebooks required to use Evernote effectively. The first is an Inbox notebook, set as the default, where all of your incoming notes sit and wait to be properly curated, tagged and massaged. The second is a general archive of all of your notes — “Notes”, if you like. Once you’ve properly tagged your note and it’s been cleansed of any transmission cruft (*like the “Fw:” in the title if you emailed it, for example*), it gets moved to the archive. From there, you have all of Evernote’s built-in filtering and searching capabilities at your disposal when it comes time to retrieve your data.

In addition to these two required notebooks, I’m a big fan of creating a separate notebook for a specific project or area of your life. A perfect example, albeit a bit “meta”, is the notebook used in creating this book. It contains drafts, brainstorming, images and other assets used during the creation process. Now, it’s very likely that, once this book is in the can and on the shelves, I’ll tag everything in it with a unique tag (*like, “Evernote book archive”*) and shove everything into the general archive. Reason being, having multiple, infrequently-used notebooks tends to create unnecessary confusion when adding new content or searching. If I have a notebook called “Financial Crap”, there’s a whole host of things that could theoretically fall under that umbrella like receipts, bank statements, loan documents and so on. If you want to create separate, long-term notebooks for individual projects or areas of your life, I suggest that their purpose and contents be extremely clear and narrow. Something like “Bank Statement Archive” would be a good example because I’m not going to go there looking for the receipt for a tankful of gas I bought. Naturally, that would go into the “Tankfuls of Gas Receipts” notebook. Kidding.

So, in short, keep as few notebooks as you can possibly get by with. It really does make things simpler.

## The Tao of Tagging

The purpose of tagging anything is to add descriptive words or phrases that will help you search for or group items later on. Evernote tagging is no different and, while there's certainly no standard practice for tagging things, I do have what I think are some helpful tricks. Each note should have, at minimum the following tags (*as appropriate*):

- ✓ **“General subject”** — I quote it here because I'm using it very loosely, but the subject of a note is a prime example of good tag material. If I create a note with a recipe for my favorite cumin-infused waffle batter, obviously we're talking about food. This should be your first tag.
- ✓ **“Specific subjects”** — To continue with the cumin waffle example, I'd also tag it with “recipes” and “waffles” since that's what the note contains. Brain surgery, I know.
- ✓ **Source** — If you grabbed this recipe from that dusty box of index cards that shipped to your house along with the rest of Aunt Mildred's worldly possessions, you might tag it with “Aunt Mildred”. If you grabbed it from some food blog or website, tag it with the name of the site.
- ✓ **Project** (*if applicable*) — If this note is part of a larger project like, say a cookbook called “The Ultimate Guide to Cumin and Breakfast Foods”, then consider giving it a tag related to that project. Many notes won't be part of such a project, so obviously this can be omitted.



- ✓ **People/places** — If the note references any people or places that you find interesting, tag the note with those as well. Don't be afraid to tag that note with "Lance Bass" or "Deluth" if it makes sense and you think it might help you find the note later on when you're planning that road trip to see the N'Sync reunion.

---

**Note:** One of the best decisions you can make early on is whether you'll be using a singular or plural convention for your nouns. For example, let's say you have a note related to your favorite movie, tagged with "film". Now, let's say you decide to maintain a list of movies you'd like to see in Evernote, so you create a note and tag it "films". While it may seem rather benign in this example, it can become a gigantic pain later on when you're searching for that "tax receipt" or "medical record". It doesn't matter if you pick singular or plural, but for the sake of your own sanity, choose one and stick with it.

---

Now that we've got our basic tagging convention down, it's time to get into one of the most powerful parts of the Evernote universe: Search.

# Evernote Search: Seek and Ye Shall Find

The most basic way to search Evernote is by plugging in a few words into the little search box and getting some results. While this is perfectly acceptable for most of the occasions you'll be searching for something in Evernote, a great deal more power exists beneath this simple exterior in the form of operators, which we'll cover in this chapter in excruciating detail.

If you want to read the full developer documentation for Evernote search, visit the resources page.

## Operators

An operator, in this context, is a word that is used as a way of indicating that the text that follows it should be used in a specific way. They are similar to Google's search operators in this way. For example, if you type "tag:foo" into the Evernote search box, you're telling Evernote that you want to see notes that are tagged with "foo". Most of the operators described below work the same way, though some of them don't require you to add anything (*"encryption:" by itself searches for notes that contain encrypted regions, for example*).

Evernote search operators share common form and logic. If you want to find all of the notes that have a certain attribute, you'd search with "operator:". For all notes that don't have that attribute, prepend your statement with a minus: "-operator:". Pretty simple, right? Let's take a look at each of the available operators and build a few really sweet saved searches while we're at it.

`any` – Because this is going to come up a lot during this section, we’re going to cover it first. The “any:” operator converts your search from an “AND” type search into an “OR”. For example, let’s say you perform a search with the following terms:

```
cumin waffle recipe
```

This will return all notes that contain all of the words “cumin”, “waffle” and “recipe”. If we add the “any:” operator, like so:

```
any: cumin waffle recipe
```

Now, this search will return all notes that contain any of those words (instead of notes that have all of them, like the previous search). Note that, if you use “any”, it must be the first term in your search.

`tag` — Obviously, this operator lets you filter notes that have (or don’t have) a specific tag. For example:

```
tag:waffles
```

This will match all of the notes in the active notebook (or all notebooks, if that’s selected) that are tagged with “waffles”. Another:

```
-tag:waffles
```

This will match all of the notes that are not tagged with “waffles” (which, for me, isn’t many). Easy, right? But what if your tag contains spaces? Equally easy — simply wrap the tag text in a set of quotes:

```
tag:"cumin waffles"
```

As you've probably already figured out, this will find all of the notes tagged with "cumin waffles" (*I have at least 30*). You can also combine more than one instance of tag to further narrow your search:

```
tag:"cumin waffles" tag:recipes
```

This search will return all (*because, surely, you have many*) notes tagged with "cumin waffles" and "recipes". You can also negate any of the tag: operators using -. What if we want to see all of our recipes and all of our cumin waffle-themed notes? No sweat:

```
any: tag:"cumin waffles" tag:recipes
```

`notebook` — If you want to narrow your search to a single notebook, here's your huckleberry. This operator is special among the others in a couple of ways. First, it can only appear once in your search (*unlike tag: and others*). For instance, this would be an invalid search:

```
notebook:Inbox notebook:Archive tag:"cumin waffles"
```

If you perform a search like this, the results will be limited to the notebook referenced in the rightmost "notebook" operator (*"Archive", in this case*).

Second, the notebook operator must also appear first in any search you perform. This is the exception to the rule about the "any:" operator being first in your query. For example:

```
notebook:Archive any: cumin waffles
```

This search will yield all of the notebooks that contain the word "cumin" or the word "waffles" in the Archive notebook.

`inTitle` — This operator does just what the name implies – searches the title of your notes:

```
inTitle:cumin
```

This search will return all of your notes that have the word “cumin” in the title. It works just like the rest as far as adding a minus, quoting strings with spaces, etc.

`created` — Allows you to search for notes created on and after a specific date and time. This one is especially hairy because of the way the date and time must be expressed. For example, the following will *not* work:

```
created:"March 10, 2009"
```

No, instead you need to provide the date and time as expressed in only numbers. The format for this is `YYYYMMDD` (*year, month, day*). So, for our previous date example, you’d need to do something like this:

```
created:20090310
```

This would give you all of the notes created on or after that date. If you want to find notes that were created on exactly March 10, 2009, this would do the trick:

```
created:20090310 -created:20090311
```

This search, when expressed in human English, says: “Give me all of my notes created on or after March 10, 2009 but not on or after March 11, 2009”. It’s a roundabout solution, but it gets the job done.

If you're feeling particularly playful, you can also supply a timezone since, by default, the date and time given are relative to the time zone of the user running the search. If you're thinking "I can't imagine ever needing to use this", you're not alone. If you want to get the full write-up on the dates and times with timezones usage, see the developer documentation link at the beginning of this chapter.

There are a few more options available for `created:` that are suitable for mere mortals:

```
created:day-1
```

This matches notes that were created yesterday or today. You can substitute "week", "month" or "year" for "day" here and still have a valid search. If you want to see all of the notes created in the last two months:

```
created:month-1
```

Or notes created 3 months ago:

```
created:month-3 -created:month-2
```

You get the idea.

`updated` — Works exactly the same as `created:`, but applies to the date a note was updated. If you haven't ever updated a note since creating it, the two dates will be the same.

`resource` — Allows you to search for notes that contain a file of a certain MIME type. If you have no idea what that means, you can read about MIME types here: [http://en.wikipedia.org/wiki/MIME\\_type](http://en.wikipedia.org/wiki/MIME_type).

To search for notes that contain GIF image files, you could issue the following search:

```
resource:image/gif
```

Or perhaps you want to find all the notes that contain audio files:

```
resource:audio/*
```

We haven't yet covered wildcard characters like the asterisk we just used, but this search is looking for any note containing any audio file, regardless of subtype (*mp3, wav, etc.*).

The full list of possible MIME types is beyond the scope of this book (*there are hundreds of them*), but a quick Google search will help you determine the MIME type of the file you're trying locate.

## Additional Operators

Since the majority of the remaining operators are, in my opinion, somewhat esoteric and are unlikely to appear in many real-world searches, they get an abbreviated definition and a single usage example. After all, "Brevity is the soul of Internet Documentation" or something.

`latitude, longitude, altitude` — These will search for notes created at a set of coordinates:

```
latitude:32
```

`author` — This matches the author's name:

```
author:"Brett Kelly"
```

`source` — This matches notes created within a certain application:

```
source:app.ms.word
```

`recoType` — For notes that contain recognition data (*like images that contain words and handwritten notes*):

```
recoType:handwritten
```

`todo` — This matches notes that contain the checkbox element; these searches returns notes that have checkboxes that are checked, not checked and checkboxes in either state, respectively:

```
todo:true
```

```
todo:false
```

```
todo:*
```

`encryption` — This matches notes that have an encrypted region in them.  
`encryption:` (*no parameters for this operator*).

Ok! That was more than a little terse, I'll admit. But, we're not done yet. How about some real-world search examples from my very own Evernote database?

Let's say I wanted to find all of the notes created in the last two weeks in my Notes notebook dealing with Evernote that contain an image:

```
notebook:Notes created:week-2 resource:image/* evernote
```

Or maybe I'm looking for all of the mp3s I added during 2008 that also have encrypted text within the notes:

```
created:20080101 -created:20090101 resource:audo/mp3
encryption:
```



A quick aside regarding the asterisk as a wildcard character. If you're unfamiliar with this practice, the idea is that you can provide part of a word and use the asterisk to mean «an anything else». One example might be this search term:

```
Everno*
```

This search will yield you any note that contains a word that begins with «Everno» and ends with anything else (*excluding spaces*): Evernote, Evernotable, Evernotationally — all of these words would match.

A couple of other things regarding the search syntax should be noted. First, you can only use wildcard (\*) characters at the end of search terms instead of within and before. According to the documentation, this is because allowing wildcard characters everywhere would put an increased load on the Evernote servers. Here are some examples of what I mean:

```
everno* — valid search
```

```
ev*te — invalid search
```

```
*vernote — invalid search
```

Also, when matching literal terms (*i.e., words or phrases that aren't attached to an operator*), then any number of spaces will be interpreted as a single space. In other words, this:

```
Evernote is [lots of spaces] Great!
```

Will match this:

```
Evernote is Great!
```

## Saved Searches

Any search that you create using either the filters in the left-hand pane or a regular text search query in the search field can be saved. After you've completed your search, click "Save" in the search description area (*just below the toolbar*) and give a name when prompted.

Once you do this, your search will be saved under Saved Searches on the left hand side. As a bonus, your saved searches are synchronized along with your notes, so you'll have them on all of your Evernote-enabled devices and machines. If you ever want to execute one of these, just click the name of the search in your desktop client or browse to the Saved Searches area of your mobile app.

## Optical Character Recognition

Finding a specific piece of text within Evernote is a whole lot easier thanks to all of the operators we've just learned about, but there's one other piece of functionality we haven't yet explored: searching for text within image files.

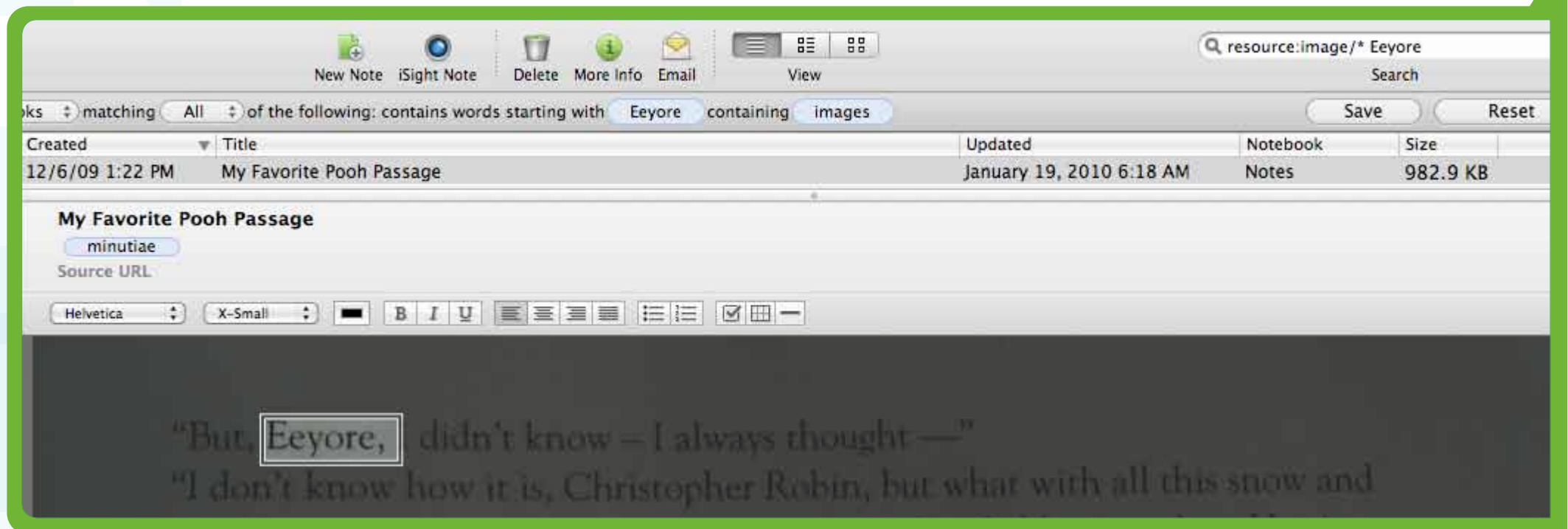
Let's say you're walking around your local farmer's market carrying your infant child in one arm and you see a flyer for a really interesting cumin waffle bake-off coming to your town in a couple of weeks. You think to yourself, "Well, I'm a huge cumin waffle nerd and would really love to make it to this thing, but I can't write it down or easily type it into my iPhone with just one hand! Curses!" You'll be happy to know that Evernote has you covered. Snap a picture of the flyer and the next time Evernote syncs, the image will be uploaded and run through their super spiffy Optical Character Recognition (OCR) system and, once these results have been synchronized back down to all of your Evernote installations, you'll be able to search for the text contained in the image.

Sounds like something you'd see on *The Jetsons*, but it really works. Check it out:

This is a search I did after I took a picture of a portion of a Winnie the Pooh book my kids are particularly fond of. If you can't read the search that I ran, here it is:

```
resource:image/* Eeyore
```

And here's what Evernote came up with:



Pretty slick.

If you're a Premium Subscriber, the OCR bit works on PDF files, too. The only difference with PDFs is when you search for a specific word or phrase on the Windows client and a PDF file matches your search, it won't forward you to the appropriate section of the document that contains your search terms (*unlike other image files in which Evernote will highlight your search terms*). This is due primarily to the fact that Windows doesn't include native support for the PDF file format the same way OS X does. Another reason to consider a Premium subscription is your images and PDFs get sent to the front of the line when you submit them for OCR processing.

So that's Evernote search. I'll be the first to admit that it's more than a little cumbersome the first time you look at it, but being able to wield this kind of power over your Evernote database is where «ninja» really starts.

Now let's find out just how crazy useful Evernote can be when you're away from a computer.

# Evernote on the Go

While the desktop applications for Windows and OS X offer a much richer experience, the most obvious means of accessing your Evernote data when you're away from your computer is using the Evernote web interface at <http://www.evernote.com>. Here, you can manage your entire Evernote database using many of the same functions you'll find within the desktop versions (*exceptions being things like dragging files, clipping with keyboard shortcuts, etc.*). If you find yourself sitting at a computer that you don't personally manage, the Evernote web interface (at <http://www.evernote.com>) works like a champ.

For the times when you're not near a computer, the good news is that Evernote web also works well on most mobile phones. If your phone has a data connection and a web browser, then you can probably interact with Evernote for the web. Fair warning: it won't be the prettiest thing you've ever seen and the capabilities are severely limited compared to the native desktop and mobile applications, but again, it's a lifesaver if all you have is the phone you got free with your service agreement and you're on the side of the road wishing you could search Evernote for your roadside assistance information.

As we've already discussed, Evernote offers native applications for a wide variety of mobile devices and platforms. What I haven't yet mentioned is that there's also a mobile interface to Evernote on the web that can be utilized by virtually any mobile phone with a browser and Internet access (*located at <http://www.evernote.com/m>*). So, even if you don't have a modern smart phone in your pocket, you'll still be able to make use of Evernote from wherever you are.

As for the native client applications available for modern smart phones, their Evernote application capabilities are rather varied. However, all platforms share the ability to create new text and snapshot notes as well as browse your existing notes. Beyond these basic pieces of functionality, the platforms begin to diverge from one another. Here's a short list of each of the supported platforms along with the basic functionality supported by each (*beyond the basics described a second ago*):

### Android

- ✓ Create voice notes
- ✓ Search
- ✓ Attach files to notes
- ✓ Organize and tag notes

### Blackberry

- ✓ Create voice notes
- ✓ Search
- ✓ Organize and tag notes

### Palm

- ✓ Thumbnail-only view

### iPhone

- ✓ Create voice notes
- ✓ Search
- ✓ Organize and tag notes
- ✓ Modify existing note content
- ✓ Create new saved searches

### Windows Mobile

- ✓ Create voice notes
- ✓ Search

Of all the native Evernote applications currently available, the version for the iPhone is definitely the most mature and feature-rich. The interface has undergone several major overhauls since its initial release shortly after the launch of the App Store in July of 2008. That said, most of these applications are under constant development, so don't be surprised if the list above is out of date about 30 seconds after I click «Save» here.

I've heard several people get their tail feathers in a ruffle over the lack of features on their particular mobile Evernote client. I can understand wanting to have all of the features that the others do, but when you consider the primary use cases for Evernote on a smart phone, creating and saving notes are what it should be really good at. Personally, I don't do much modifying of existing notes on my iPhone since, as you can probably imagine, I'm creating notes and finding them the vast majority of the time and hardly ever have a need to change them before I can get back to a computer.

For more information regarding the capabilities of Evernote on your smart phone, visit the Evernote download site (*you can find a link on the resources page*).

As promised, it's time to delve deeper into Evernote's best friend: email.

# Evernote, Email and You

## (Well, Mostly Evernote and Email, Really)

As we discussed briefly in Chapter 1, Evernote likes when you email things to it. This is easily my most frequently used method for adding notes and content to my Evernote database because it's simply a matter of clicking "Forward", typing the first few characters of "Evernote" and hitting «Send». And for the budding ninja out there, you can also define the target notebook and tags to be assigned to your note in the email subject line before you send it. The syntax looks like this:

```
I'm the happy subject! @Notebook #tag1 #tag2 #tag3
```

Simply add the name of the notebook preceded by the 'at' symbol (@) and add any tags by preceding them with the hash (#). A few caveats, though:

- ✓ Currently, the notebook and tags you define in the email subject *must already exist* in your Evernote database
- ✓ The note title must come first; tags and notebook second.
- ✓ This feature won't work for notebooks that contain the @ or # symbols or for any tags that contain #.

Even with these limitations, this relatively recent addition is a productivity switchblade for those of us who spend a good deal of time emailing things to Evernote.



## Email Filters

One of the most obvious use cases for Evernote is as a repository for things like receipts and other notifications that you'd like to keep forever. Surely manually forwarding these messages can't be the most efficient way to get them into Evernote, right? Check this out.

Just about every email application (*web or desktop*) has the ability to perform actions based on the characteristics of the message. For example, in GMail, any email sent to me by my wife automatically gets a special label so I can easily find all of her messages later. What if we could do some cool stuff with these types of filtering mechanisms to remove some friction from our Evernote workflow? Well, you'll be happy to know that doing this is pretty straightforward as well. Let's say you wanted make sure all of your Amazon receipts are automatically sent to Evernote as they arrive. In GMail, you'd create a filter like this:

- Star it
- Apply the label: Choose label...
- Forward it to: your.address@m.evernote.com
- Delete it

This will match all of the messages from Amazon that look like receipts. You'll get a few false positives, but this is much more efficient than having to forward them manually every time. Now, tell GMail to forward all of these messages to your special Evernote email address:

Whiz-bang, you're done. If you're not concerned about seeing these messages as they arrive and simply want a copy of them sent to Evernote, you can also have them deleted or archived by checking the appropriate boxes. Your favorite email application might not offer the same filtering capabilities as Gmail, but almost all of them will allow forwarding based on the sender's address, so that could be another bit of data you could leverage here.

Speaking of automatically sending emails to Evernote, what about using Evernote as a selective email archive? I mean, if you want to keep all of your stuff in Evernote, this seems like a logical use case. No, I don't mean automatically forwarding every piece of email you receive, only the stuff that has value going forward. Let me walk you through my usual email workflow used on the job to better illustrate how you might do this.

When I started a new project at my last job (*where I used Microsoft Outlook*), I created for it a subfolder in Inbox where all project-related emails would live for the duration of the project. Once the project wrapped up, I took all of the emails in that folder and added them to Evernote (*the Windows desktop application ships with an add-in for Outlook that allows you to do this with a single click*). They all got a special tag referencing the project in question and were then deleted from Outlook.

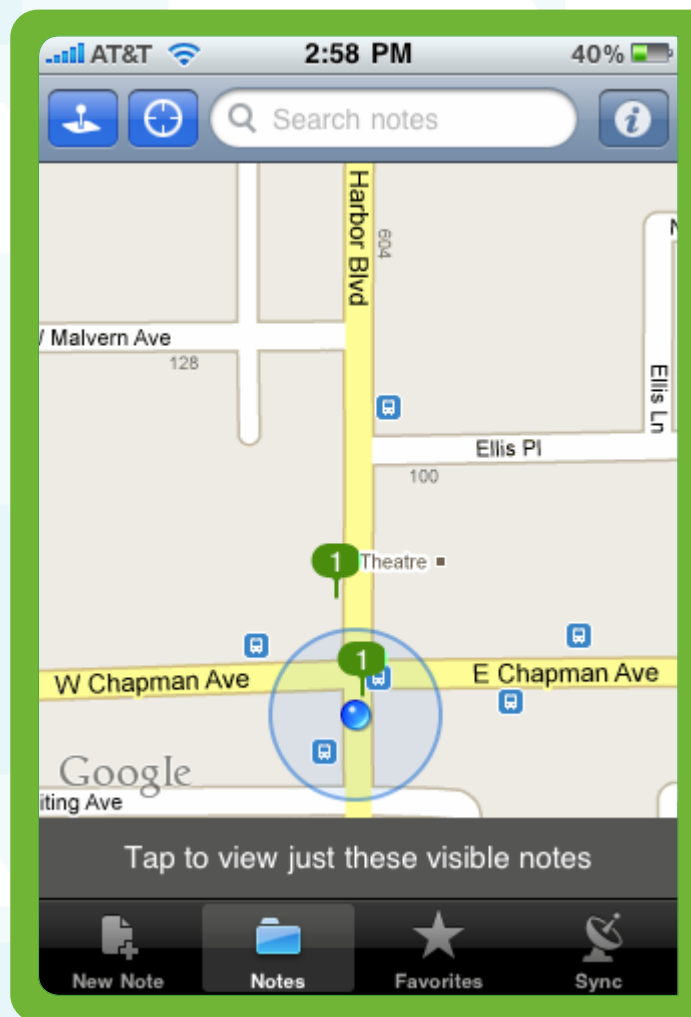
If you think this is a little strange or you're wondering why I don't simply archive the folder within Outlook instead, there are several reasons for this:

- ✓ Evernote (*as you know*) synchronizes with the web, so it's automatically backed up, whereas Outlook archives aren't by default.
- ✓ My brain is trained such that, when I need a piece of information on just about anything, Evernote is the first place I look. This might be putting too many eggs in one basket, but this approach has served me very well so far.

Your ability to make these techniques work will obviously depend on the capabilities of your email application or service of choice, but these examples should be enough to get your brain working on how you can make Evernote and email play nicely together in a way that suits your individual needs.

Up next: putting Evernote on the Map: Geotagging.

# Evernote and Satellites in Space



Have you ever spent 20 minutes wandering around a large parking lot looking for your car? Perhaps you've also done so while pressing the "alarm" button on your keyless remote in an attempt to have your car give you an audible clue as to its location. Heaven knows I've done this more than once.

Good news, though: if Evernote on your particular smart phone allows the uploading of GPS coordinates with notes (*as I write this, the Android and iPhone applications support this*), then all you need to do is create a new note when you first park your car; maybe name it "Car!" or something. Then, when it comes time to head out, you simply call up the "Car!" note and plot it on a map relative to your current location. So easy a monkey could do it. I have a monkey and he did it.

In addition to being able to see where a given note was created on a map (*assuming it was created on a device that automatically attaches GPS coordinates to new notes*), you can also fire up the map view in the iPhone client to see a map containing all of the notes you created there as well as nearby. Here's an example:

This is just one example of how handy it can be to attach a physical location to your Evernote content. Some other possibilities include keeping track of your favorite hiking or biking spots, restaurants you like in other cities or maybe highlight the high points of a road trip or other travel excursion.

Now, let's get down and dirty with Evernote tags.

# Tagging for Superhumans

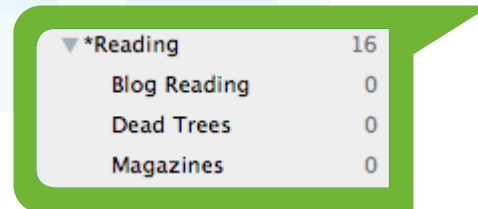
One of the major complaints I've heard from newer Evernote users is that, while it's insanely easy to add information to your Evernote database, it's somewhat difficult to get it back out. While Evernote features a very powerful built-in search, perhaps you're more comfortable simply selecting a tag or two to narrow your search. Even if you don't, taking a little extra time to maintain your list of tags can be extremely beneficial down the road, lest you end up with an unmanageable entanglement of tags that does little more than depress you.

We've already talked a little bit about deciding between singular and plural tag names (*"books"* vs. *"book"*, etc.). It's hard to overstate how much trouble this decision can save you in the long run. So, please, do yourself a favor and pick a convention and follow it mercilessly.

## Nested Tags

The user experience folks at Evernote understand that people are going to potentially add a huge amount of data to their databases and, in all likelihood, an equally large number of tags. So, they added this nifty little feature that lets you nest your tags by dragging one or more tags onto another tag so that they become "child tags". This doesn't have any bearing on how the tags are implemented, however — it's merely a way to make your tags easier to interact with visually. Let's look at some examples.

I'm a fairly avid reader and the types of things I read are pretty varied (*books, blogs, magazines, etc.*). Say I wanted to keep all of my reading-related tags together because, well, because it's my party. If I click each of the future children and drag them onto the tag I want to house them all, the result looks like this:



You can probably already see how useful this can be. Instead of having a tag for every single variation on the cumin waffle recipe you've collected and created, you can simply drop them all under a "cumin waffles" parent tag.

## Controlling the Sort

Being a true cumin waffle fanatic whose tags easily number in the hundreds, it can be a real annoyance to have to scroll down to the "C" tags every time you want to reference a recipe. Well, with a little hackery, you can control which of your tags appear at the top of the alphabetically sorted list. If you change "cumin waffles" to "\*cumin waffles" (*note the asterisk at the front of the tag*), it jumps to the top. Nifty, eh?

You can use several symbol characters to control the sort with even more granularity. Below is a table of all of the symbols you can place in front of a tag to have it appear at (*or near*) the top, in order of precedence:

- ! – Exclamation Point
- # – Hash or Pound Symbol
- \$ – Dollar Sign
- % – Percentage Symbol
- & – Ampersand
- \* – Asterisk (*or Star*)

@ – ‘At’ Symbol (*will sort after any tags beginning with a number*)

^ – Caret (*will sort after any tags beginning with a number*)

In other words, if you prepend a tag with !, it will appear at the very top of the list. Tags beginning with # will appear just below tags with !, and so on.

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**Tip:** Create a tag called “!Frequent” and drag any tags you want easy access to into that tag.

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## Maintenance

As you create and add new notes in Evernote, you’re able to type in whatever tags you like. If you add a tag that doesn’t currently exist, it will be added to the “top-level” tag list (*meaning, it won’t belong to any parent tag by default*). So, if you’re serious about keeping your tags in order, you’re going to have to spend a few minutes every so often assigning these new tags to parent tags if appropriate.

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**Tip:** When you change a tag in the tag list (*say, from “cumin breakfast pastries” to “cumin waffles”*), all instances of that tag in your notes will also be replaced with the new value.

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Evernote's tag management has some growing up to do. As I write this, the only way to add a tag to more than one note in your database is to find the tag in the tag list and drag it onto the relevant notes. This doesn't exactly scale when you want to add a set of five tags to a group of 20 notes (*since you'd have to multi-select all five tags and hope that you remembered to highlight all of the target notes correctly before you drag the tags onto the notes*). The brass at Evernote have made several mentions of reworking the tagging interface to be more robust and powerful, but for now we have what we have.

Tags are one of the key elements in a successful Evernote experience. With the proper care and feeding, they can enable you to find any bit of information in even the most vast of Evernote databases in a matter of seconds.



# Evernote for Bloggers

Since everybody seems to have a blog these days, it can be useful to have a way to manage the various ins and outs of running one. For some bloggers, managing their blog is little more than mashing out a few paragraphs about their current cummin waffle obsession and clicking “Publish”. For others, running a blog is a full-time job, complete with advertising agreements and assets, legal documents and, of course, a whole slew of drafted blog posts in various stages of completeness. Thankfully, Evernote is here to help and scales surprisingly well as a blog management system.

To begin using Evernote to manage all of your blog-related information, create a separate notebook for your blog — call it “Blog”, perhaps. Clearly, this is where everything dealing with your blog will live. Second, create a new tag specific to your blog — again, “Blog” seems like a fine idea. All of the tags related to your blog will be placed within this tag. It might be a good idea to prepend some unique character or string to each child tag (like, “blog - ”, for example) just so they’re easy to remember when you’re tagging new notes.

The skeleton of your Evernote-powered blog management system is now complete. Now, let’s add some content that almost any blogger is going to need, big or small.

## Notes

Your blog surely lives on some remote computer or web host, so keeping all the information related to the hosting setup is definitely worth spending the time it takes to create it. Some ideas for things to keep in your “Hosting Info” note:

- ✓ Hosting company name, address
- ✓ Hosting company support phone number and/or email address
- ✓ URL for the control panel for your web host (*assuming they provide one*)
- ✓ Login information to manage your hosting account (**Tip:** *highlight and right-click your password and choose “Encrypt”*)

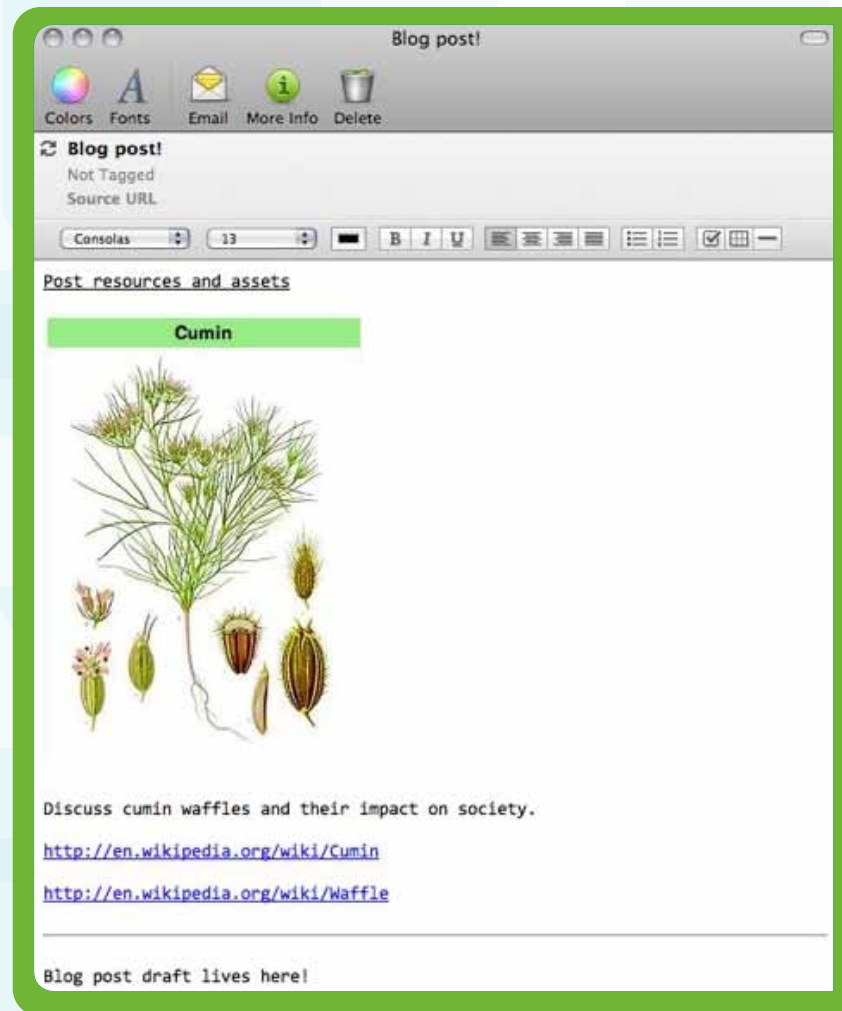
Tag this note with “blog – host”.

Next, you’re probably going to want to gather up the relevant information about the blog itself and keep that in a single note. Some ideas for “Blog Info”:

- ✓ Blog URL
- ✓ Blog admin URL
- ✓ Blog admin login (*encrypt this, too*)
- ✓ RSS feed URL

Tag this note “blog – info” or something similar to find it easily.

The reason people start blogs is to create content that can be posted. The final note that I think is essential to a blogger’s Evernote database is what I call the Dashboard note. Here, you can track all of the upcoming topics you’d like to write about, upcoming features you’re thinking about adding to the site and unfinished tasks relating to your blog. Making and monitoring a list like this is



an important part of operating a serious blog and Evernote provides all of the basic facilities for doing so easily.

As far as what else to keep in a notebook like this, well, your only limit is your imagination. Here are some other ideas:

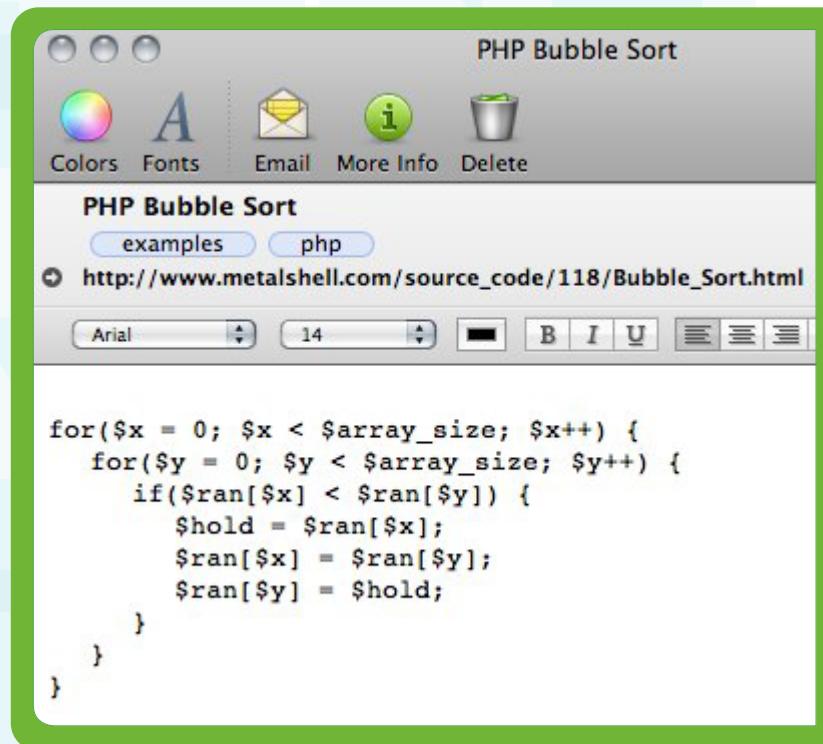
- ✓ Drafts of blog posts (*bonus points for including images or links you'd like to include*)
- ✓ Advertising agreements and assets (*like advertising images or HTML snippets*)
- ✓ Mailing list of other folks you'd like to contact when you finally complete a comprehensive guide to better cumin waffles
- ✓ Copies of spreadsheets or other records detailing your rising number of page views, RSS subscribers and mountains of cash you're now making from a very successful, well-managed blog

I could go on, but you get the idea.

Since writing is the most common task in maintaining a blog, it seems fairly obvious that Evernote is a fine place to draft your blog posts. Having done a bit of blogging myself, I like to format my blog post notes in Evernote something like this:

The beginning of the note will contain any ideas, links or images I feel like I may want to use when composing the blog post. After the horizontal rule comes the post body itself. It seems pretty simple, but it's really nice to not have to go hunting around for all of the different components of your perfect cumin waffle manifesto when it comes time to write it. There are as many different workflows as there are bloggers, in all likelihood, but Evernote as a complete blog management tool has served me well.

# Evernote for Programmers



I'll admit that I have more experience with this particular use case, as programming is how I put cumin waffles on the table and spiderman t-shirts on my kid's back. Since we programmers deal primarily in text, Evernote is just begging to be your personal programming encyclopedia. Let's see what kinds of things we code monkeys can do to really harness the power of Evernote...

## Code Samples

If you're anything like me, you have a fair number of code snippets that you reference regularly. Personally, I can never remember how to format a MySQL timestamp using PHP's `date()` function, so I created a note in Evernote with the relevant code and it's never more than a few keystrokes away. And, of course, with the proper tags and naming, I can find all of the PHP code I've saved going back to the beginning. For instance, if I ever find myself in want of a simple Bubble Sort implementation in PHP, Evernote has me covered:

I've been around programmers long enough to know that those who maintain an extensive library of sample code tend to have a great deal more hair than those who don't. Anecdotal, yes, but true, in my experience.

## Manuals

Most of the major tech publishers these days have taken to releasing their books as PDFs in addition to paper books. Since Evernote can store, render and index PDF files, you can potentially create a large library of programming texts that you can search when you want to bone up on JavaScript or find out what in the world a decorator is in Python. Here are a few examples of programming documents that I've collected in Evernote over the years:

10/3/08 8:25 AM	Why's (poignant) Guide to Ruby
10/2/08 2:22 PM	LaTeX Introduction
10/1/08 8:11 AM	Evernote API Overview
9/22/08 11:19 PM	The Objective-C 2.0 Programming Language
9/11/08 10:40 AM	Private Members in JavaScript

## Links and Web Archives

Ever stumble across a blog post outlining a really cool Perl trick you'd never seen before? Ever have that happen when you're three months away from your next Perl project? Use that handy web clipper to grab the whole blog post and store for review later. Perhaps tag it with "perl" and "to read" so, when that Perl project comes knocking at your door, you're a search away from the info you need.

## Archived Releases

I realize this is somewhat redundant given the ubiquity of version control systems and the like, but I'm a big fan of keeping a running archive of the various releases of a project. Reason being, many times a user will fire off an email asking you to investigate a bug with a previous version and having the last 20 of them in Evernote makes it easy to grab the release in question and install it instead of having to do a whole new checkout and build.

Implementing this practice is fairly simple. Each time you create a release build of your application, simply copy the resulting package or executable into a new note and tag it with the name of the application and the version number.

## Documentation

I've fully documented several systems and projects using Evernote with great success. The ability to share a document easily with email or a shared notebook online, combined with how easy it is to format the text and include screenshots and other ancillary documents, make it an extremely effective tool.

## Hair-brained Schemes

Most programmers, in addition to the projects they work on for their day jobs, also have nasty habits of having what they believe to be awesome ideas for the next Facebook, YouTube or Myspace every couple of hours or so. Create new notes for each of your ideas and, if you decide to pursue them, use the same note to expand on your idea and eventually a tag or separate notebook for research and brainstorming new features.

Even if none of these example use cases fits your particular job or needs exactly, the fact that we programmers deal almost exclusively in text and that Evernote excels at storing and indexing text should be reason enough to investigate it for your long-term storage and archival needs as a programmer.

# Evernote for Foodies



Most of us know somebody who's an absolute champion in the kitchen. If this person is the product of an earlier generation (*let's say it's Grandma*), then chances are she keeps her recipes on index cards collected in a dusty old tin. When she needs to bake a mess of biscuits, or maybe crank out a batch of everybody's favorite cumin waffles, she simply grabs the right card and gets to work.

Evernote, not surprisingly, makes a fantastic recipe book. I only know how to make about 4 different dishes (*most of them involve some variety of ramen noodle — and not the good kind*), but all the recipes are in Evernote. If I find a recipe online that looks interesting, it gets shuffled off into Evernote, tagged as “recipe” and is promptly forgotten about until, well, forever in most cases. My own shortcomings as a chef notwithstanding, having Grandma's recipe box stored in a digital, searchable database is a pretty wonderful thing.

But it's not just for recipes, Martha. The folks at Evernote go out of their way to describe the cataloging of wine as an ideal use case for Evernote. If you combine the geotagging capabilities available on some Evernote-ready devices and the optical character recognition technology used by Evernote, then you've got the makings of a pretty robust wine library complete with a photo of the label and the location where you tipped it back. And let's not forget how easy it is to compose a shopping list in Evernote when you're preparing a large meal or how apt Evernote is at managing your shopping research for a waffle maker that won't toast the cumin (*because who wants that?*).

When Evernote CEO Phil Libin travelled to Japan in the latter part of 2009, he kept an Evernote notebook containing pictures of every single thing he ate while he was there. If you are of the dieting sort, you can also do this and maybe include things like the rough number of calories in the food relating to your diet. You can see a blog post outlining Phil's experience by visiting the resources page.



# Evernote for Covert Double Agents

Assassinating a foreign dignitary is never easy business. You've got to spend weeks or more doing reconnaissance before you can even consider how and when you're going to line up the cross hairs. Luckily, you have some pretty amazing tools at your disposal: the aerosol can that's actually a small explosive, a super sexy notebook computer, the latest iPhone and a small explosive that's actually an aerosol can.

Let's say you've tracked your target from to Florence, learned his routine and are trying to find some small hole in his massive security infrastructure. From your rooftop perch you notice that he enjoys eating breakfast at the quaint little restaurant in the Piazza della Signoria. Later that morning you stroll in, order an espresso and get a lay of the land. After snapping several pictures of the interior and adding GPS coordinates, all of this data is sent to Evernote for safe keeping.

When you get back to your villa later that evening, you fix yourself up a cocktail, don the casual white dress shirt and park it on the balcony overlooking some expensive neighborhood so you can go over the day's activities. First, you fire up Evernote and synchronize so you have access to all of the high-res photos you took from the picturesque bell-tower and the Ponte Vecchio across town (*which were automatically uploaded using your EyeFi memory card*). Perusing the images, you note possible escape routes and candidate locations for the heroic helicopter rescue that will undoubtedly be necessary as you're being frantically pursued by an armed cavalcade of well-dressed security personnel who'd like nothing more than to help you kick the breathing habit. You're a double agent

— these things come with the territory and planning for contingencies is part of your job.

Once you've keyed in the GPS coordinates of the nearest helipad and bank roof (great for repelling and thus, escaping certain death), you're about ready to plan the endeavors of the following day. Oh, but what's this? It appears that your inordinately attractive personal assistant back at the office has added a new note to your Assassination notebook in Evernote with an updated dossier on your target. You read through it, making the necessary adjustments to your plan of attack. After all, you're nothing if you're not thorough.

With tomorrow's plan in place and all details ironed out, it's time to make sure your client has applied a \$2 million credit to your numbered account at that one Swiss bank. Evernote has the URL and encrypted login credentials for the bank, so you quickly sign on to make sure that you've been paid. Hey, even a cold-blooded killer has to eat.

Everything's in place and you're finally ready to bed down for the night. Tomorrow's a big day, after all. As you close your eyes and prepare for slumber, you realize just how fine a thing it would be to enjoy some fresh Italian coffee and a nice cumin waffle before sending a man to an early grave. Remembering that you've already noted in Evernote (*with coordinates*) at least three places in Florence that make a killer cumin waffle, your eyelids gently fall and rest is yours.

# Evernote as an Address Book

I don't know about you, but one thing I've always found bothersome with most digital contact managers is their insistence that they know which types of data I'm going to want to store about each person. Long story short, this usually results in most of the labeled fields ("*Spouse's Birthday*" and "*Mobile Fax Number*" spring to mind) being left blank and whatever arbitrary "Notes" field is included being packed to the gills with all sorts of random minutiae about my new contact.

Creating a bonafide contact list in Evernote is not only easy, it's actually kind of fun. If it's free-form data, Evernote can pretty much hang with whatever you can throw at it and a contact list is no exception. Here's what an Evernote-powered address book might look like.

After you create your new "Contacts" notebook (*you could use a unique tag here, but I find that being able to visually get there quickly is valuable in this situation*), decide on a convention for naming your notes. Because you probably want to be able to quickly scan your list of contacts, a convention that allows you to easily sort them alphabetically is probably best; so you go with the old "Last Name, First Name" format. For tagging, I think it's best to tag the note with the word "contact" as well as the person's full name (*e.g., "Brett Kelly"*). Reason being, there's a good chance that other notes in your database are going to reference specific contacts and since (*as I write this*) there's no way to link to a specific note within the application, a tag is your best bet.

The really sweet part about using Evernote for contacts is that you have absolute freedom as to how each entry is formatted. So, if you were to create a contact note for me, it might look something like this:

Here, a Premium Subscriber could also include a vCard (a portable format for storing contact information) of his contact info or maybe a CV — any document you want, really.

Because you can build these things any way you like, adding additional information is a very simple proposition. In fact, you could probably turn this into a fairly capable Customer Relationship Manager (CRM) application where you can track the last time you communicated with someone or things you're waiting on from them.

There are some obvious Address Book features that aren't possible here, like sending an email to multiple contacts and having birthday reminders sent to your calendar, but if you use a contact list primarily as a bucket for storing all of the people you know and you want a great deal more flexibility in how you store their information, this could be just the trick.



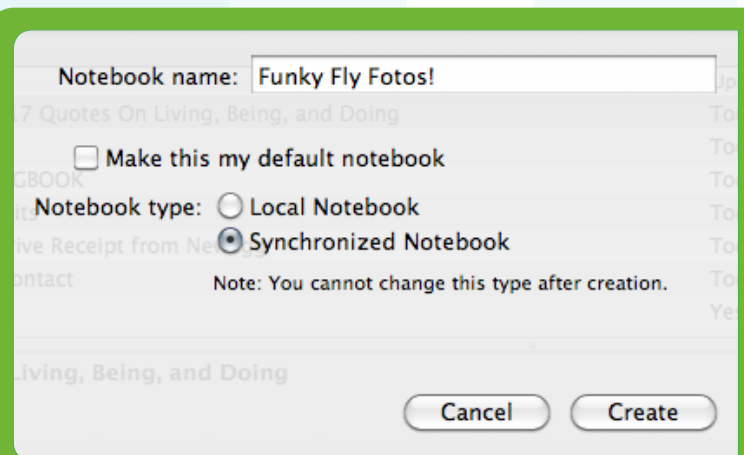
# Evernote as a Simple Photo Sharing Service

In the spirit of using Evernote for everything, we'll now explore the possibility of using Evernote as a simple photo sharing service. As I mentioned, Evernote natively supports adding photos (*as well as indexing any text they contain using the Optical Character Recognition technology*) and that adding new photos from your smart phone is easy as cake. When you combine this capability with the Shared Notebooks feature, you've got yourself a pretty robust and simple way to share your photos online, complete with tagging and RSS syndication.

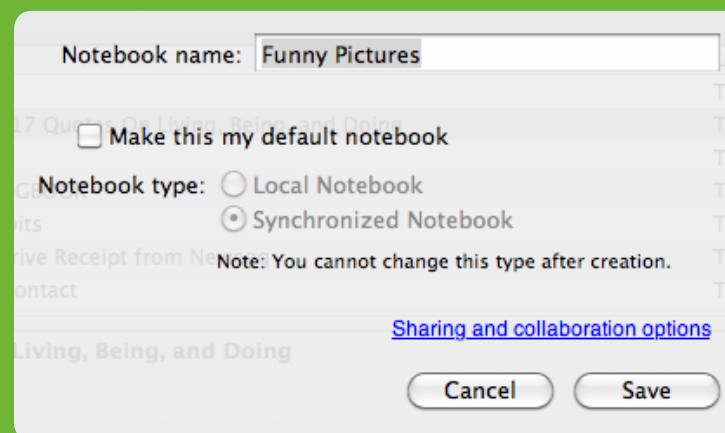
Thankfully, this is a fairly straightforward process. First, let's create the notebook that will house our photos. If you click "File > New Notebook", you'll be greeted with a dialog box (*the dialog will look slightly different if you're doing this in Windows or on the web, but the info will be the same*).

For this to work, the notebook you create must be a synchronized notebook (*since your photo gallery is going to live on the web*). Name it whatever you like and click "Create". Your new notebook should appear in your notebook list on the right. Right click the notebook and choose "Notebook Settings" and you'll see a dialog box.

No, you're not crazy — this is almost exactly like the previous dialog you saw when creating your notebook, except this one has a link near the bottom that says "Sharing and collaboration options" (*and the notebook name is different because I like to keep people guessing*). When you click that link, your browser will open and you'll be taken to the web version of Evernote. On the left hand side, you'll see "start sharing with the world".



New Notebook dialog box.



Notebook Settings dialog box.



Sharing and collaboration options.

Once you click “Start sharing with the world”, you’ll be taken to a new screen where you can set things like the notebook name, description and sort criteria. Fill out the options to your liking and click “Save”. With that, you’ve got yourself a swanky online photo album that you can manage from within any of your Evernote-capable machines and devices. Simply add any photos (*or anything else you’d like*) to this notebook and the next time it syncs, it will be available for Aunt Gertrude to check out. If you want to get crazy ninja with it, you can instruct your family and friends to subscribe to the notebook using RSS and they’ll find thumbnails of each new image you add and can easily click through to your shared notebook to see the full image.

# Evernote as a Task Manager

Having been cut from the cloth of productivity nerds, this example holds a special place in my heart and I can personally vouch for its viability as a legitimate task management system. That said, please note that this is merely an example of how you can manage tasks and projects using Evernote. Your mileage may vary. And if you think this configuration looks and smells a lot like a certain book you've read, that's because several of the ideas behind this have been cribbed from people smarter and more attractive than myself.

According to a completely made-up study done by some famous university late last year, the number of different methods for managing tasks and projects is sufficiently large enough to issue two unique systems to every man, woman and child on the planet. Not really, but there are a lot of them. Again, keeping with the idea of living in Evernote, let's build a working task management system.

First, create a new notebook called "Tasks". This notebook will be the exclusive home of your task lists, project lists and the like. Any resource that you'll need to complete a project will live in a different notebook. To start with, let's create your project list.

Create a new note, call it “Project List” and tag it “project list”. Now, add everything you want to do in the near future, a sentence or two each.

Some examples:

- ✓ Buy new waffle iron
- ✓ Buy cumin in bulk
- ✓ Send apologetic greeting card to Aunt Gertrude for the waffle fiasco
- ✓ Apply burn cream to forearm

This list should be the master project list from which you work, so you’ll be updating it frequently with new projects as well as removing completed projects.

Now, create another new note called “Someday List” and tag it “someday list”. For everything that you want to do at some point in your life, add a sentence or two here. More examples:

- ✓ Fly to Rome for the annual “Cookin’ with Cumin” conference
- ✓ Build a swing set out of Bazooka Joe wrappers
- ✓ Finish that halting sonnet I started in college



To manage the stuff you've delegated to other people (or things that simply haven't happened yet), create your "Waiting" note (tagged "waiting"). Generally, these will be things that need to happen before you can move forward on a project or other endeavor. Examples:

- ✓ Bob to return my cumin waffle cookbook
- ✓ Milton to get back to me about the TPS report cover sheets
- ✓ Release of the new version of Evernote (for blog post)
- ✓ A clean-burning fuel

All of these notes are going to be reviewed daily during the creation of our next note, the daily task list. You will create one of these every day, so the correct naming convention for easy sorting is important. Mine looks something like this:

- ✓ Task List – 2/5/2010

Including "Task List" might be a waste, but having a note whose title is simply the date seems unintuitive. This convention satisfies the sorting requirement, so it works for me.

In this note, you'll be adding "to do" items (*checkboxes*). To figure out what's to be included in this list, you'll refer to the three notes we created earlier (*Projects, Someday and Waiting*), as well as the previous day's task list if anything was left undone. I also separate my tasks between work and home because I don't want "give the ferret a flea bath" staring me in the face all day while I'm at my office and unable to take care of it. The whole thing might look like this:

**To Do:**

- ✓ Submit TPS report
- ✓ Take a long lunch and go to the Apple store to drool
- ✓ Suck up to the boss

**To Do @ Home:**

- ✓ Buy a can of whatever gets flea dip out of a lovely new sweater
- ✓ Buy an apology-oriented card for the wife
- ✓ Price new ladies sweaters

It's also a good idea to keep a more immediate version of your "Waiting" list here. Things that you are confident you'll hear back on at some point during that day are good candidates, as well as things that have been on hold for a long time (*so, if prudent, you can send an email to somebody reminding them that they still owe you that thing, whatever it is*). Example:

**Waiting:**

- ✓ Bob: cumin waffle cookbook
- ✓ Sandra: response regarding bathing in the employee washroom
- ✓ Boss: pink slip

My advice is to, each morning, create your task list (*or the night before if that's your game*), open it and leave it open all day. As new things show up, add them to their appropriate list and check off the things you finish. At the end of the day, you're probably going to have a long list of checkboxes in various states of "checkedness". Everything you finished that day, and is thus checked, stays where it is. Everything else gets one of two different treatments: it gets the "strike-through" text (*a horizontal line through the middle*) indicating that you've decided that it's not worth doing, or you replace the unchecked box with a simple arrow indicating that it was moved to the next day. Obviously, adding the arrow implies that you also create a new item on the next day's task list.

One more section can be optionally added to each task list is a Notes area. Here you can put anything you'd like and is mostly useful for historical purposes. Example:

**Notes:**

- ✓ Had really bad chinese at lunch, lost a few friends.
- ✓ Boss complimented me on how squeaky clean my desk was!
- ✓ Sandra from HR told me that, no, I can't bathe myself in the washroom.

Anything you want, really, as long as it's specific to the day in which it appears.

So, there you have it — Evernote as a task manager. It's a very flexible system and, if you're already using Evernote everything else, feels very natural. Couple this with a couple of well-constructed saved searches, and the system is also quick and easy to manage on your favorite Evernote-enabled mobile device.

# Evernote as a Filing Cabinet

If I had to make a wager as to the top two primary concerns on the mind of the average human, they'd probably be:

- ✓ Is Lance Bass going to embark on a solo career?
- ✓ How can I get rid of all of this paper in my filing cabinets?

As for Lance Bass, well, that's anybody's guess. But, as for the paper thing, Evernote has you covered like grandma's quilt. Because of the magical indexing and searching of PDF files available to Premium Subscribers, you can take a very large chunk of your paper records and stick them into Evernote very, very easily. If you have a filing cabinet that's splitting at the rivets from being so full of old catalogs and issues of "Cumin Wafflers Quarterly", then a ticket to more room and more sanity is yours for the taking in the form of the Fujitsu ScanScap document scanner.

This honestly isn't a sales pitch, but the ScanSnap is an extremely useful piece of hardware. Once you configure it to scan documents directly to Evernote (*as in, you push the button, the document passes through the device, a new note appears in Evernote a few seconds later*), then you can start scanning all of your paper into new notes in Evernote. Give each note a title and a few tags and you're going to wonder how you got along without it. You'll also be thinner and more attractive to the opposite sex!

Also, if you want to reduce the amount of paper that's delivered to your home every day, it's very likely that many of the banks and creditors with which

you deal are starting to offer paperless statements that can be reviewed and retrieved online instead of through postal mail. This means that you can keep meticulously complete records of your finances in a searchable database without ever shedding a single tear for that tree that will ne'er again be hugged. Saving them as a PDF is best in my opinion because the original formatting is maintained and you can read it on just about any computer. If you don't have the option to save your paperless papers as PDFs, you'll do just fine by simply using the web clipper to grab the appropriate data. If you're really serious about maintaining formatting and can't do PDFs, there's always regular screenshots (*remember the OCR stuff we talked about before?*).

You know enough about tagging and notebook arrangements from reading everything up to this point, so chances are you've already got an idea how you want to organize an archive like this. The goal is to be able to find anything very quickly, so name and tag accordingly.

Now you can tell your children that you did your part to make sure that the world wasn't a steaming wasteland of ash for them to inherit. Yay us!

# For Longtime Users: Regaining Control of Your Evernote Database

I realize that many of you are probably not trying Evernote for the first time. Maybe you installed it back when your IT dork suggested it was cool or after you read an article on it on some blog someplace. You got it installed, added a ton of stuff to it and promptly forgot about it. Now, you open the application, update to the latest version and you're staring at a mountain of disorganized notes, inconsistent tags and a veritable sea of notes called "Untitled Note". You want to get all ninja with this stuff, but the idea of going through and cleaning up what you've already collected seems both a maddening and incredibly daunting task. This chapter's for you, Peggy Sue.

## Small Scale Manicuring

Let's say your first foray into Evernote land was particularly short and you've only got a few notes, maybe a couple dozen altogether. Rather than proceed to the next section, you can probably just clean them up really quickly in only a few minutes. If all goes as planned, you're going to have thousands of notes in this thing before it's all over and having a handful of stragglers isn't going to kill you.

What of those poor souls who added their lives to Evernote the first afternoon they tried it way back when? Keep reading.

## Triage

If your Evernote database is sufficiently large and equally unwieldy, it's unlikely that you'll get all of your stuff cleaned up in a single sitting. And since you'd probably like to start using Evernote now instead of when everything is ship shape, your best bet is to do the Evernote Emergency Triage dance. It goes like this:

- ✓ Take every single note in your database and move it to a new notebook called "Pending".
- ✓ Delete every single tag you've got.
- ✓ Create a new notebook (*or several, if that's your bag*) where everything you add going forward will live.

Now, you can start using Evernote the way you intended. When you find yourself with a little spare time on a Saturday afternoon, start working through your Pending notebook. Take each note and fix the title, tags and anything else about it that doesn't conform to your newly-minted standard of Evernote excellence. If you can spend just a few minutes per day performing this cleanup operation, you'll have all of your ducks in a row in no time. Remember - even if all of your Evernote data is inadequately tagged and named, that data will still be indexed and searchable, so don't worry about not being able to find something in the unprocessed stacks because you can always search for it.



## Regarding Deletion

One more thing. As you're looking through each of your Pending notes and you come across some that could easily be deleted, then — by all means — delete them. If you're certainly never going to need to look at these notes again, there's no reason in the world for you to keep them around to fatten up your disk usage and muddy your search results. If, however, there's any possibility that you could ever have need for these bits of info ever again, it's best to just hang onto them. All the minor annoyances of seeing them and doubting their usefulness will disappear when you're standing in the aisle at the Safeway wondering what brand of shoe polish your Aunt Gertrude likes and Evernote has the answer.

Recovering from a chaotic Evernote database is never easy and it can take a long time to get back to harmony. Just realize that this is the case, shove everything else to the side and get to work. Cleaning is for when there's no work to be done.

# Conclusion

Creating a complete archive of all of your ideas, memories, personal records and more sounds like a pretty lofty goal. The beauty of a service like Evernote is that it not only makes adding new things easy, but it also makes it easy to find what you need, when you need it.

In my two years of using Evernote, it's become one of my most trusted and valued tools for everything from my work to my hobbies and beyond. It's my sincere hope that this guide has helped to show you how versatile a tool it is and that there's tremendous value to be had in adopting it.

Thanks for reading.

Oh, one more thing. Throughout this book, you've been referred to «the resources page» for various links to things. This was done because links on the web have a way of changing after poor slobbs publish their ebooks and I wanted to make sure that I could always direct you to the right place if that ever happened. That Web site, again, is located at

<http://nerdgap.com/evernote/resources>.

# About the Author

Hi, I'm Brett. I'm a software developer, aspiring writer and all-around nice guy from Southern California. I also have a family and, by buying this book, you've helped put a little more food on their table. Thank you for that.

You can read more of my stuff at one of several places:

- ✓ <http://brettkelly.org> — This is my personal blog where you'll find all sorts of random minutiae about me. If you're looking for pictures of my lunch or the funny crap I encounter throughout the day, this is the place to look.
- ✓ <http://nerdgap.com> — My (*slightly more*) serious blog about the intersection of tools, technology and effectiveness. This is also, incidentally, where this book lives.
- ✓ <http://twitter.com/inkedmn> — My home on Twitter; a combination of mini-rants, dumb Internet jokes and the occasional bit of nerdy wisdom.
- ✓ <http://brettmakesthings.com> — This is where I list my professional accomplishments, experience and skills. No accolades though, as I haven't received any. If you're interested in giving me an accolade, you can get in touch with me using the email address below.

If you want to get in touch with me for any reason (*accolades!*), send an email to [brett@brettkelly.org](mailto:brett@brettkelly.org).

# Disclosure

In May of 2010, after I had written 95% of this book, I was hired by Evernote Corporation — and I continue to work for them, even as you read this. I tell you this because I want it to be clear that, even though I work for Evernote, this is not an official Evernote product and any responsibility for its technical accuracy or overall awesomeness rests squarely with me.

# Acknowledgments

I may surprise you to learn that this document was not produced in a vacuum. Granted, I did most of the typing, but I can honestly say that, without the following people, this thing would have never seen the light of day.

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This thing doesn't look like absolute crap because of my good friend Christopher DeCaro over at Kneadle, Inc. (<http://kneadle.com>) I owe him a lot. If it were left up to me, you'd be reading this on a stack of cocktail napkins fastened together by a crude combination of paperclips and bubble gum.

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